Healthwatch Hub – Local Healthwatch User Guide

Author(s):	Date: 7th May 2013
Reviewed by:	Version: 1.0
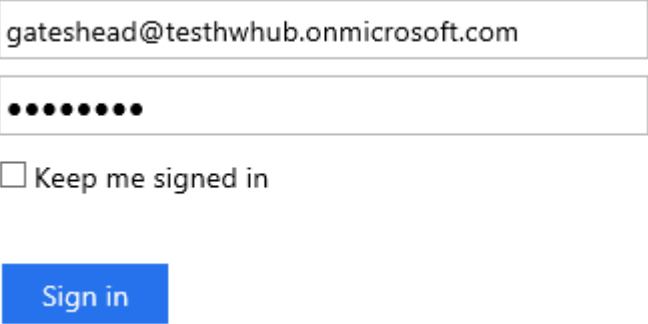
1. LOCAL HEALTHWATCH ADMINISTRATOR

1.1. Common Tasks

1.1.1.   Navigate to the Hub

Step	Description	Screenshot
1.	If not already logged in, enter link to Hub in browser address bar https://hwhub.sharepoint.com	
2.	Enter login details sent to you by Healthwatch England and click 'Sign in'	gateshead@testhwhub.onmicrosoft.com ●●●●●●●● ☐ Keep me signed in Sign in
3.	You will be taken to the Hub or receive a warning message if entering incorrect details	We don't recognize this user ID or password Make sure you typed the user ID assigned to you by your organization. It usually looks like someone@example.com or someone@example.onmicrosoft.com. And check to make sure you typed the correct password.

1.1.2.   Navigate to a Local Healthwatch

Step	Description	Screenshot
1.	From any site click the 'View all local Healthwatch' link in the top right of the page	Search this site ▾ 🔍 You are viewing: Healthwatch England View all local healthwatch
2.	Click the Local Healthwatch you wish to visit	URL Bury … Essex … Gloucestershire … Lewisham …
3.	Alternatively, enter the name of the Local Healthwatch you wish to search for in the box above the listing and click the search icon or hit 'enter' key This will reduce the listing based on your search term.	Bury 🔍

1.2. Manage Local Healthwatch Site

Definitions

Web Part (Widget)

A Web Part is a reusable component that can be added to any web page within the Hub. These components allow you to do things such display rich text content on a page, surface documents from a library or display a YouTube video.

Web Part Zone

Web Part Zones are a predefined section on a page to which users can add Web Parts. There are often many web part zones on a page allowing users to position web parts as required.

Web Part Page
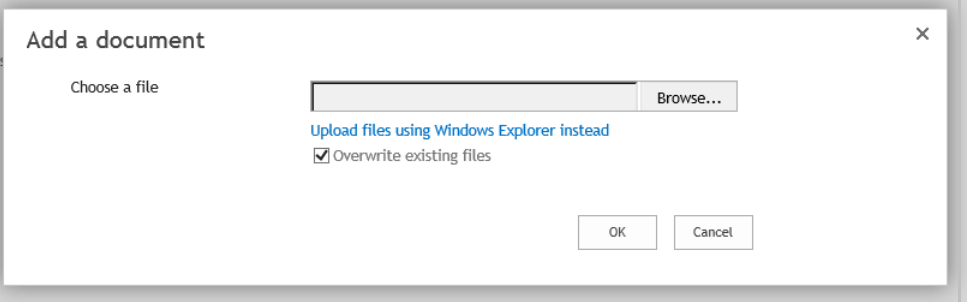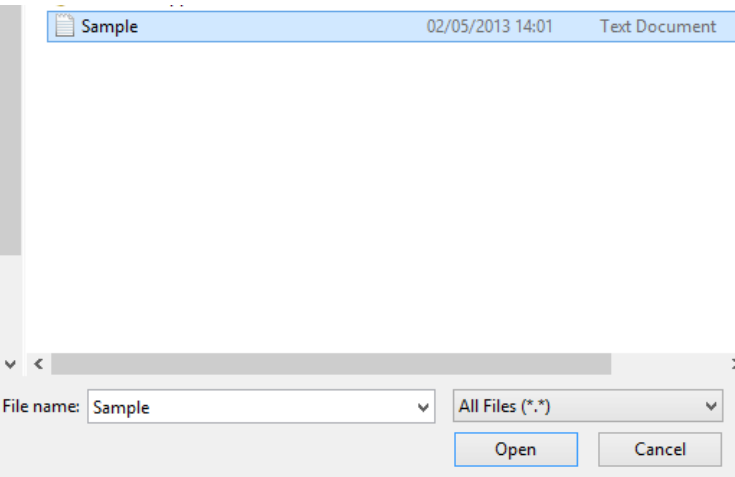
A Web Part Page is a single page of rich content and contains a number of Web Part Zones and can be edited and added to as required. 'Home', 'Announcements' and 'Resources' are all instances of a web part page within your Local Healthwatch site.
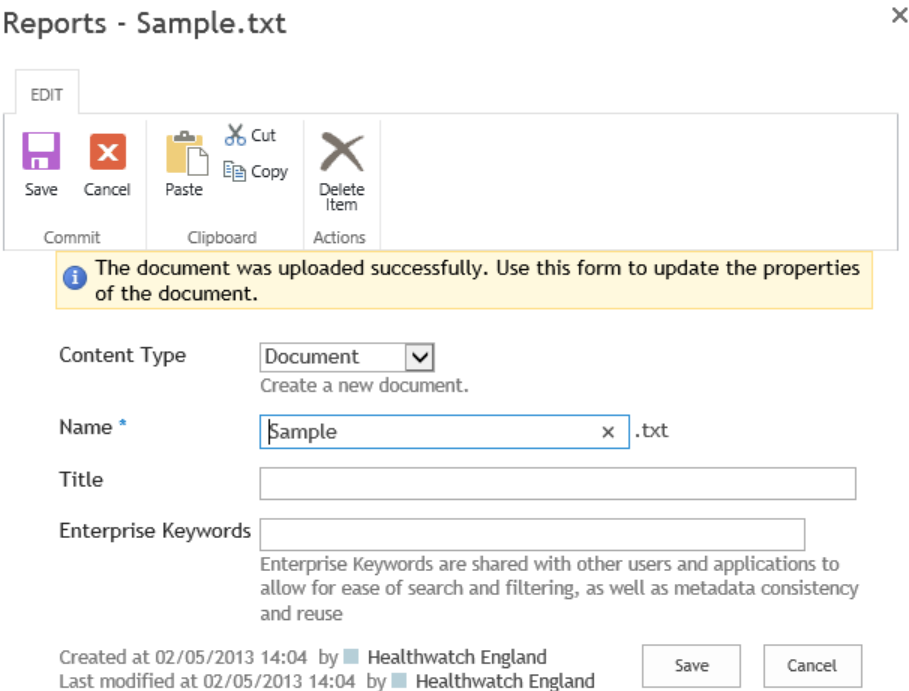
1.2.1. Manage Report Documents

This part of the document shows you how to manage documents in the reports documents library. This document library is used within the "Local Reports" web part that is situated on the home page. The methods outlined in this part can be used to update other document libraries. Each Local Healthwatch can upload reports or other documents to their own library and make these available for themselves and other Local Healthwatch to view/download.
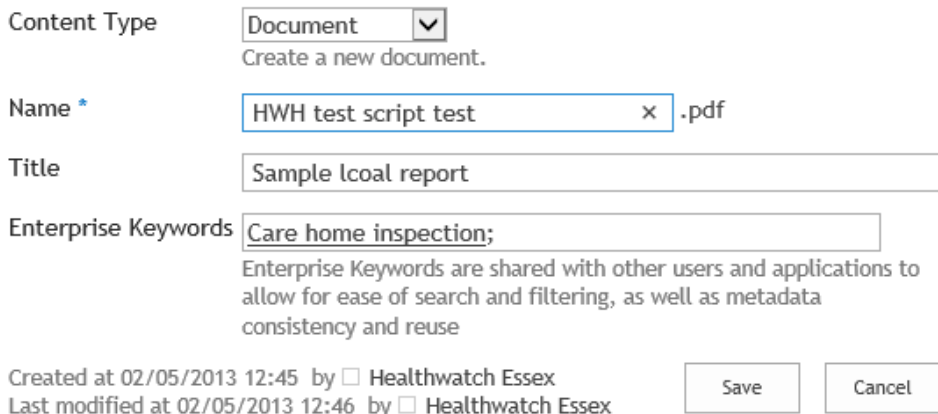
Add Document to Manage Report Documents

Step	Description	Screenshot
1.	Click on the "Local Reports" web part header on the home page of the local Healthwatch	**Local Reports**
2.	Click on the "Add New Document" Link	⊕ new document
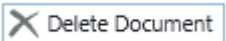
Step	Description	Screenshot
3.	Click on the "Browse" Button	**Add a document** ✕ Choose a file [_____] Browse... **Upload files using Windows Explorer instead** ☑ Overwrite existing files OK Cancel
4.	Find file and click "open" and click "ok"	Sample 02/05/2013 14:01 Text Document File name: Sample ▾ All Files (*.*) ▾ Open Cancel

Step	Description	Screenshot
5.	Add information with the document you have uploaded and click "Save" Enterprise keywords are any word(s) you believe best describes your document and can be used by other Local Healthwatch to search for the document	Reports - Sample.txt ✕ EDIT 💾 Save ❌ Cancel 📋 Paste ✂ Cut 📄 Copy ✖ Delete Item Commit / Clipboard / Actions ℹ The document was uploaded successfully. Use this form to update the properties of the document. Content Type [Document ▾] Create a new document. Name * [Sample ×] .txt Title [ ] Enterprise Keywords [ ] Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse Created at 02/05/2013 14:04 by ▪ Healthwatch England [Save] [Cancel] Last modified at 02/05/2013 14:04 by ▪ Healthwatch England

Edit Document in Report Documents

Step	Description	Screenshot
1.	Click on the "Local Reports" web part header on the home page of the local Healthwatch	**Local Reports**
2.	Click on the tick next to the document you wish to edit	✓
3.	Click on the "Files" link in the top ribbon	FILES
4.	Click on the "Edit Item" link the menu that appears below the ribbon.	Edit Properties
5.	Update the information within the form that appears and click the "Save" button	Content Type: Document — Create a new document. Name *: HWH test script test × .pdf Title: Sample lcoal report Enterprise Keywords: Care home inspection; Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse Created at 02/05/2013 12:45 by ☐ Healthwatch Essex Last modified at 02/05/2013 12:46 by ☐ Healthwatch Essex Save Cancel
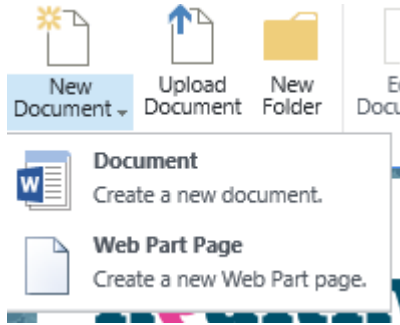
Delete Document from the Report Documents

Step	Description	Screenshot
1.	Click on the "Local Reports" web part header on the home page of the local Healthwatch	Local Reports
2.	Click on the tick next to the document you wish to edit	✓
3.	Click on the "Files" link in the top ribbon	FILES
4.	Click on the "Delete Document" link below the top ribbon.	✕ Delete Document

Adding Web Content to a Document Library

This sections shows you how to add content to the "Local Reports" document library. This will enable you to create a Web Part Page and show you how to add content into that Web Part Page. You might choose to create a web part page when a document isn't suitable for the content you wish to display. For example, a web page containing links to other sites or information you wish to let the user view quickly rather than having to open a document.

Add web part page to library
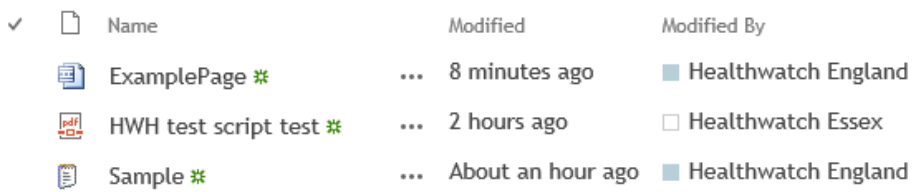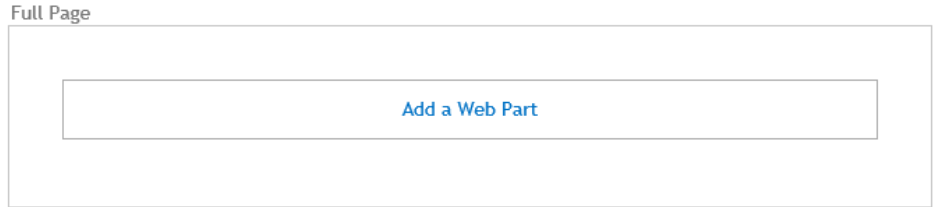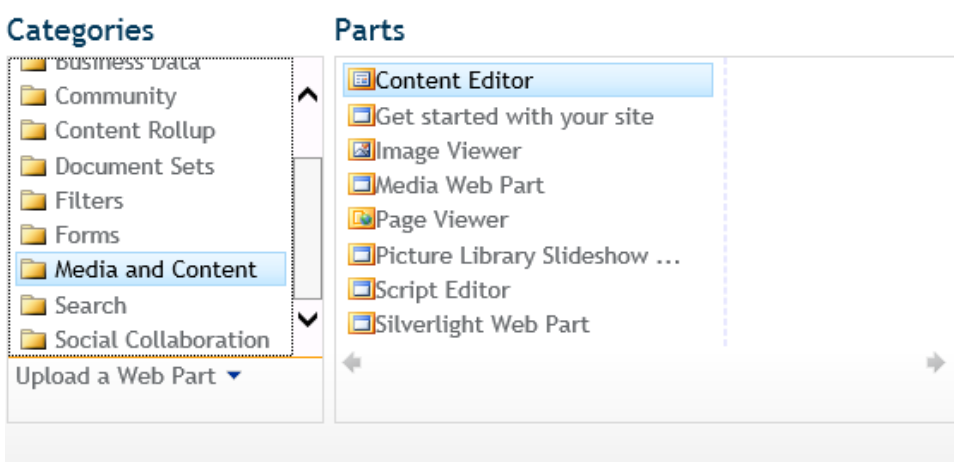
Step	Description	Screenshot
1.	Click on the "Local Reports" web part header on the home page of the local Healthwatch	**Local Reports**
2.	Click on the "Files" link in the top ribbon	FILES
3.	Click on the "New Document" drop down and select "Web Part Page"	New Document · Upload Document · New Folder · Document - Create a new document. · Web Part Page - Create a new Web Part page.
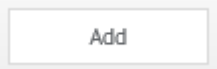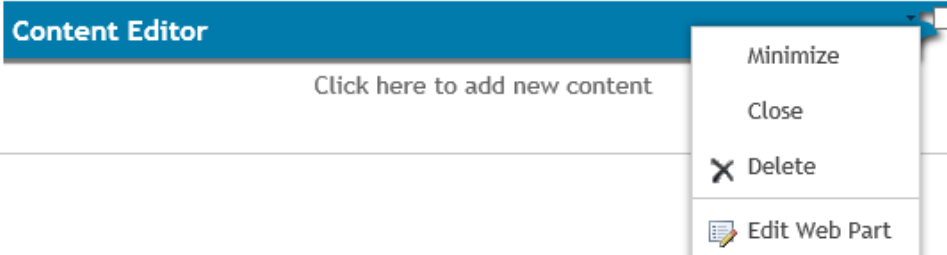
Step	Description	Screenshot
4.	Add name and select layout and click "Create"	**Name** Type a file name for your Web Part Page. The file name appears in headings and links throughout the site. **Name:** Example Page .aspx ☐ Overwrite if file already exists? **Layout** Select a layout template to arrange Web Parts in zones on the page. Multiple Web Parts can be added to each zone. Specific zones allow Web Parts to be stacked in a horizontal or vertical direction, which is illustrated by differently colored Web Parts. If you do not add a Web Part to a zone, the zone collapses (unless it has a fixed width) and the other zones expand to fill unused space when you browse the Web Part Page. **Choose a Layout Template:** Header, Footer, 3 Columns Full Page, Vertical Header, Left Column, Body Header, Right Column, Body Header, Footer, 2 Columns, 4 Rows Header, Footer, 4 Columns, Top Row Left Column, Header, Footer, Top Row, 3 Columns Right Column, Header, Footer, Top Row, 3 Columns Create Cancel
5.	Change the properties of the page item by following "Edit Document in Manage Report Documents"	
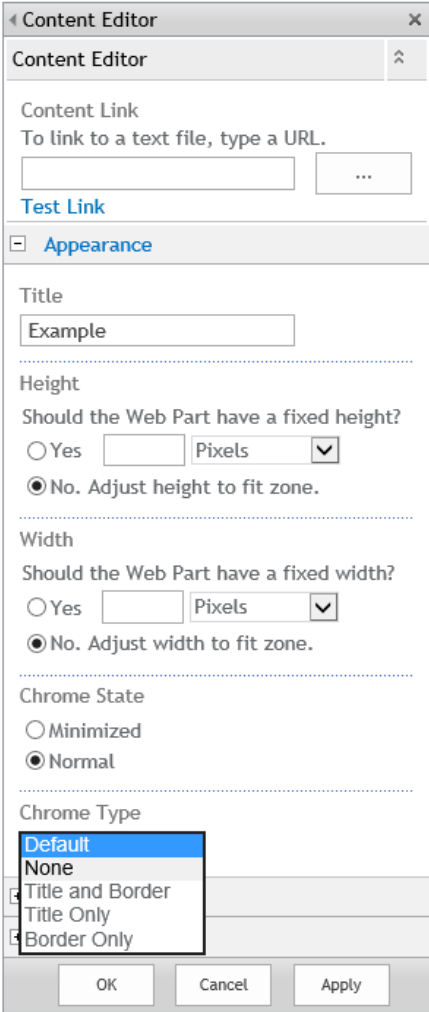
Edit web part page
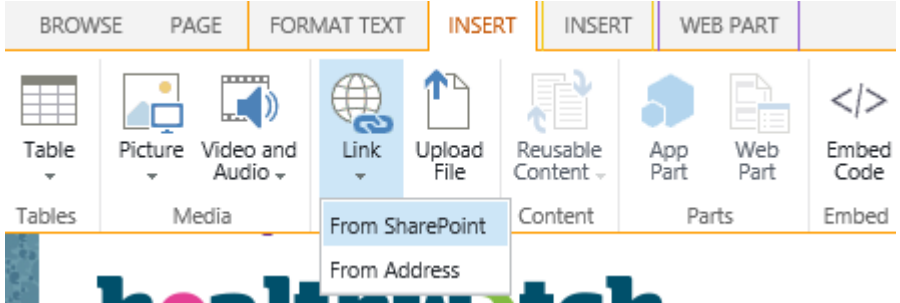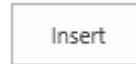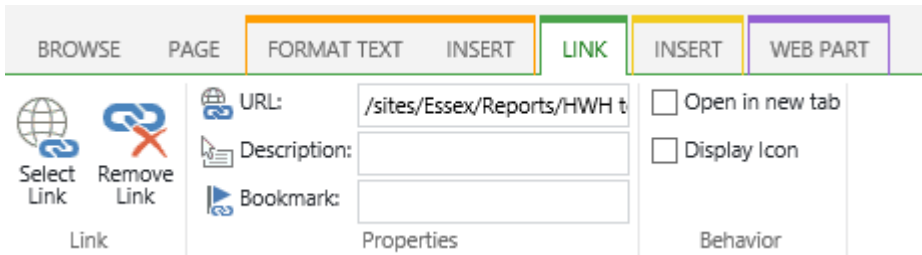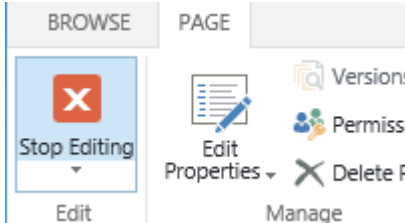
Here you can add content, add a link to a document (PDF or other) and add web parts to the page

Step	Description	Screenshot
1.	Click on the "Local Reports" web part header on the home page of the local Healthwatch	**Local Reports**

Step	Description	Screenshot
2.	Click on the name of the web part page you created	✓ Name — Modified — Modified By ExamplePage ✻ ... 8 minutes ago ▪ Healthwatch England HWH test script test ✻ ... 2 hours ago ☐ Healthwatch Essex Sample ✻ ... About an hour ago ▪ Healthwatch England
3.	Click on the "Page" link that is in the top ribbon	PAGE
4.	Click on "Edit Page"	Edit Page
5.	Click on the "Add a Web Part" link	Full Page Add a Web Part
6.	In the categories click on "Media and Content" and then in parts click on "Content Editor"	**Categories** — **Parts** Business Data — Content Editor Community — Get started with your site Content Rollup — Image Viewer Document Sets — Media Web Part Filters — Page Viewer Forms — Picture Library Slideshow ... Media and Content — Script Editor Search — Silverlight Web Part Social Collaboration Upload a Web Part ▾

Step	Description	Screenshot
7.	Click "Add" button	Add
8.	Click on drop down menu next to the content editor web part and click "Edit Web Part"	Content Editor ▾ □ Minimize Click here to add new content Close ✕ Delete 📝 Edit Web Part

Step	Description	Screenshot
9.	Change the settings of the web part properties not to show a title: Scroll down to "Chrome Type" and select "None". The header will not be displayed for your web part. Click "OK" to confirm.	
10.	Click on "Click here to add new content" link to add content	Click here to add new content
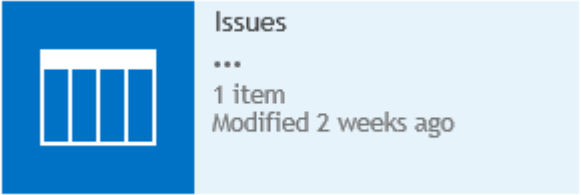
Step	Description	Screenshot
11.	To insert a link to a pdf document click on the insert button in the top ribbon, then click on Link drop down and click on "From SharePoint"	
12.	Browse to the document you wish to add a link for and click on "Insert" button	
13.	When the link is on the page select the link and click the "Link" menu in the top ribbon	
14.	Select "Open in new tab" check box	
15.	To save the page click on "Page" and "Stop Editing"	

1.2.2.   Manage Guidance Documents

Follow the same process as Manage Report Documents

1.2.3.   Manage Issues

Within this section you will be shown how to manage Issues list items. When changes are made within this section the Issues web part on the home page of your Local Healthwatch will be updated with the latest content you create.

Step	Description	Screenshot
1.	Click on the "Site Contents" link in the top navigation	**Site Contents**
2.	Click on the list you wish to add / edit / delete item in. In this case the list is "Issues"	Issues ••• 1 item Modified 2 weeks ago
3.	Add item by click on the "Add Item Link" and fill in the content. Finally click "Save" ➢ **Title**: This is the title that will displayed ➢ **Date**: The date if the issue ➢ **Description**: A general description	⊕ new item

Step	Description	Screenshot
		Title * [ ] **Description** [ ] **Date** [ ] 📅 [12 AM ▾] [00 ▾] [Save] [Cancel]
4.	Edit item by selecting the item in the list and clicking "Edit Item"	⊕ **new item** or **edit** this list **All Items** ⋯ [Find an item 🔍] ✓ Title Date Description ✓ Sample ⋯ 17/04/2013 20:00 An issue ra
5.	Update fields and click "Stop"	**Stop** editing this list **All Items** ⋯ [Find an item 🔍] ✓ Title ▾ Date ✏ Sample ⋯ 📅 19/04/2013 20:00

Step	Description	Screenshot
6.	To Delete select the item as you did in previous section and click on the "Items" drop down in the top ribbon. Click "Delete Item" to confirm	

1.2.4.   Manage Meetings

To edit / delete / update items please use the same method shown within the "Manage Issues" section. Below is a reference to the fields this list contains. This is list is specific for the Meetings web part.

Step	Description	Screenshot
1.	Meetings list fields are descripted below ➢ **Title**: This is the title that will displayed ➢ **Enterprise Keywords**: These are the keywords that are associated with the item ➢ **Description**: A general description ➢ **Start Date**: This is the date that is used in the web part and if the date is lower than today's date it will be previous section. ➢ The External Link is a URL field and you can enter a hyperlink to any related content for the meeting	Title * [_____] Enterprise Keywords [_____] Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse Description [_____] Start Date [_____] 📅 External Link Type the Web address: (Click here to test) http:// Type the description: [_____] Save Cancel
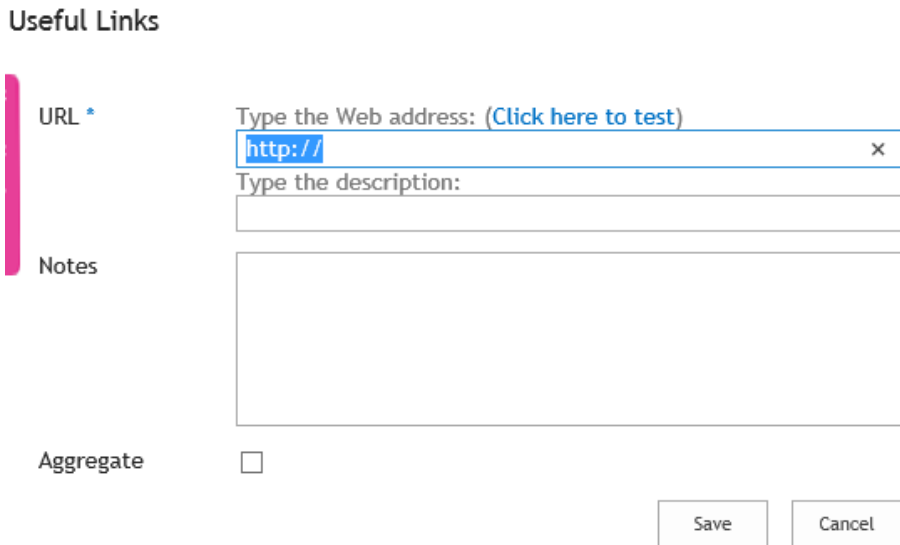
1.2.5.   **Manage Announcements**

To edit / delete / update items please use the same method shown within the "Manage Issues" section. Below is a reference to the fields this list contains. This list is specific for the Announcements web part.

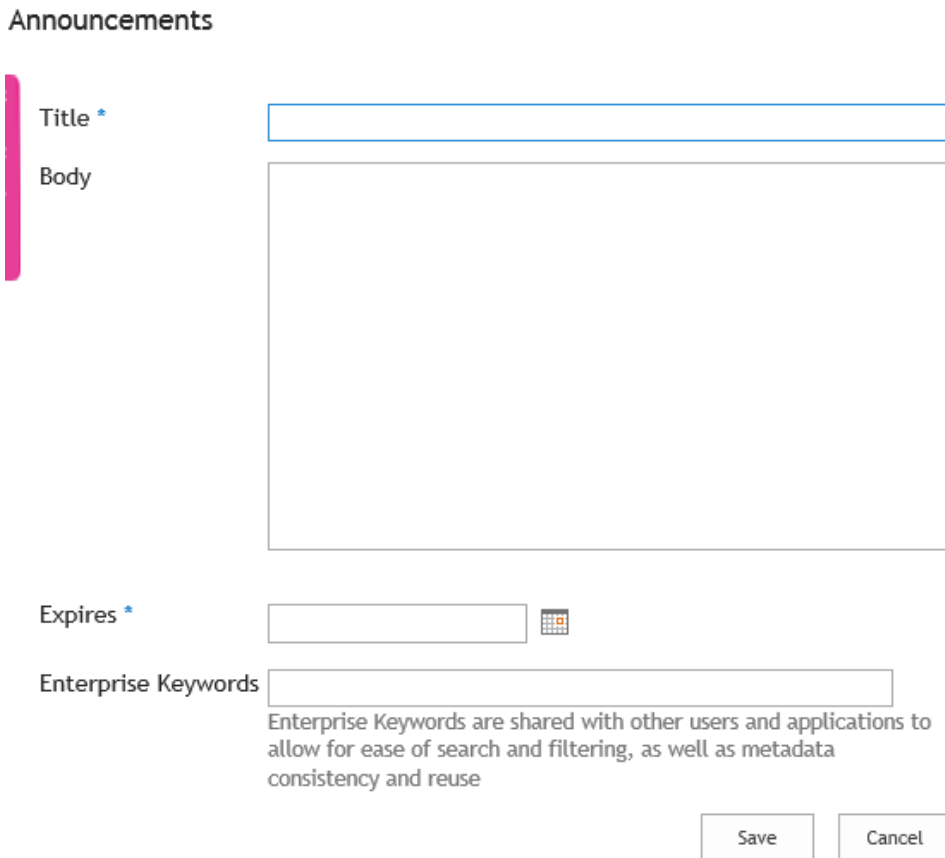| Step	Description	Screenshot
1.	Meetings list fields are described below ➢ **Title**: This is the title that will displayed ➢ **Body**: This is the text that is displayed in the web part ➢ **Expires**: This is the date that is used in the web part and if the date is less than today it will not be displayed. ➢ **Enterprise Keywords**: These are the keywords that are associated with the item	**Announcements** Title * Body Expires * Enterprise Keywords Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse Save Cancel
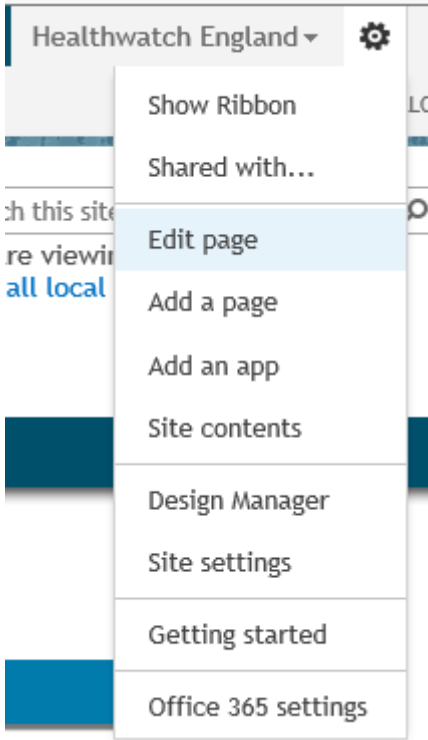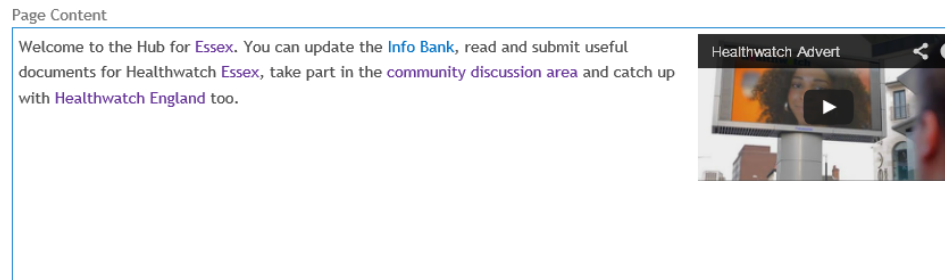
1.2.6.   Manage Useful Links
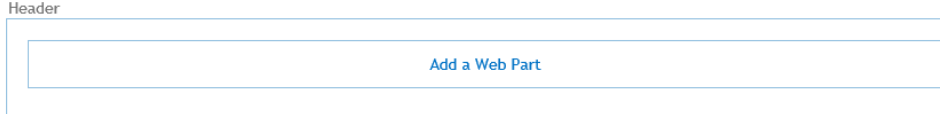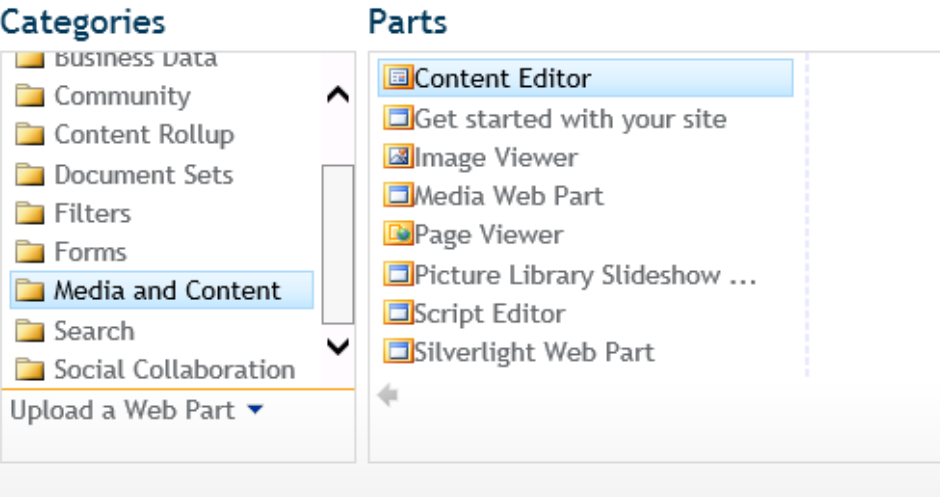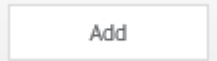
To edit / delete / update items please use the same method shown within the "Manage Issues" section. Below is a reference to the fields this list contains. This list is specific for the Useful Links web part.
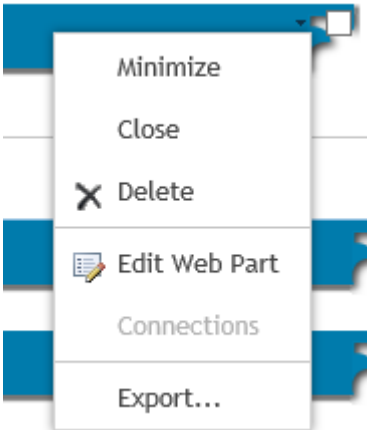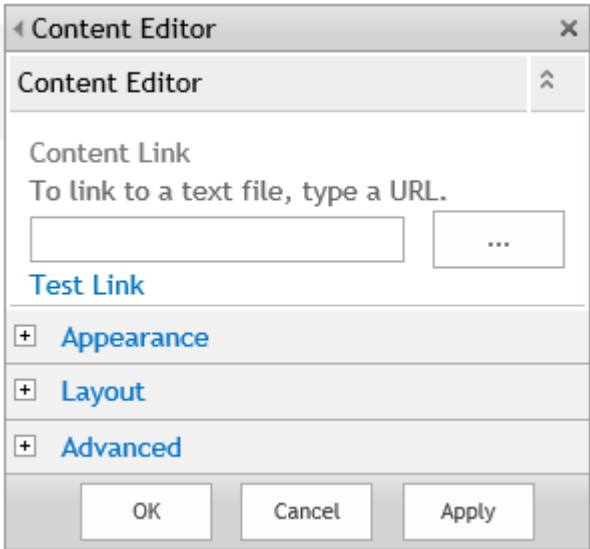
Step	Description	Screenshot
2.	Meetings list fields are descripted below ➢ Url: Type is the web address and type description is the name of the link ➢ Notes: Details that are attached to the link ➢ Aggregate: Check this box if you wish to aggregate	**Useful Links** URL * Type the Web address: (Click here to test) http:// × Type the description: Notes Aggregate ☐ Save Cancel
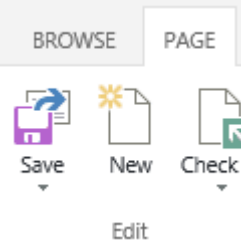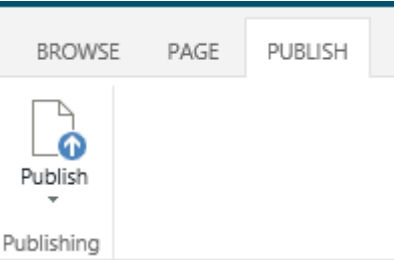
1.2.7.   Manage Web Pages and Content
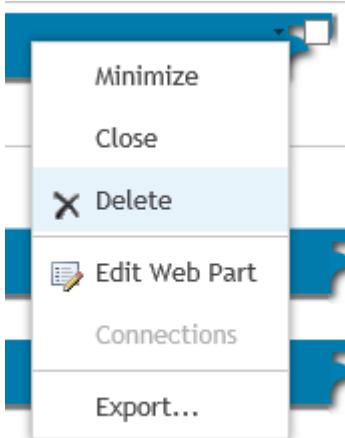
Within this section we will be showing how to make changes to the "Home" page. This section includes how to add / edit / delete web parts on this page. It also includes how to add text to the page text.

Step	Description	Screenshot
1.	Navigate to either the home page, resources or announcements page. Click on the Icon and select "Edit Page"	
2.	To update page content click in the page content section and add text	

Step	Description	Screenshot
3.	To add a web part to the page, click on "Add a Web Part"	Header Add a Web Part
4.	Select the category and the part you wish to add. There are many web parts for you to use and add functionality or content to your pages.	**Categories** Business Data, Community, Content Rollup, Document Sets, Filters, Forms, Media and Content, Search, Social Collaboration, Upload a Web Part ▾ **Parts** Content Editor, Get started with your site, Image Viewer, Media Web Part, Page Viewer, Picture Library Slideshow …, Script Editor, Silverlight Web Part
5.	Click on the "Add" button	Add

Step	Description	Screenshot
6.	To change the web part properties click on the arrow next to the web part title bar and click on "Edit web part"	Minimize Close ✕ Delete 📝 Edit Web Part Connections Export...
7.	Change the web part properties and click the "Apply" and "OK" button	◄ Content Editor ✕ Content Editor ⌃ Content Link To link to a text file, type a URL. [ ] [...] Test Link [+] Appearance [+] Layout [+] Advanced [OK] [Cancel] [Apply]

Step	Description	Screenshot
8.	Finally click on "Page" in the top ribbon and click "Save"	
9.	**Your changes will not be seen by other Local Healthwatch until you check-in and publish the page** If you wish to check in your changes click on "Page" and "Check in". Add your comments and click "Continue" The reason why you may want to "Check in" content and not publish is because you want to save the changes you have done but not make them available to everyone.	
10.	The last step to publishing the page is to click on the "Publish" button in the ribbon at the top. Click "Publish" icon and on the next screen add comments and click "continue"	

Step	Description	Screenshot
11.	To delete a web part click on the drop down next to the web part header and click "Delete"	

1.2.8.   Manage Announcements Page

To see how to change content please use the same methods shown in the home page section
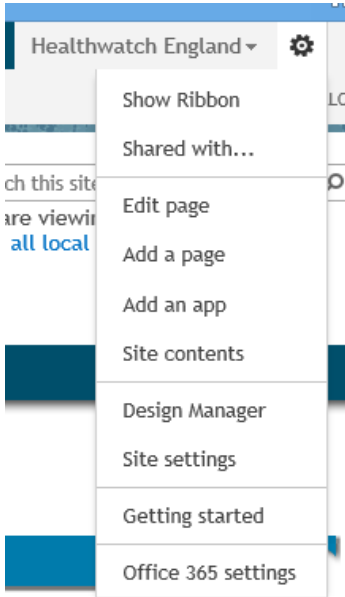
1.2.9.   Manage Resources Page
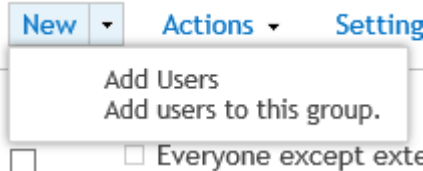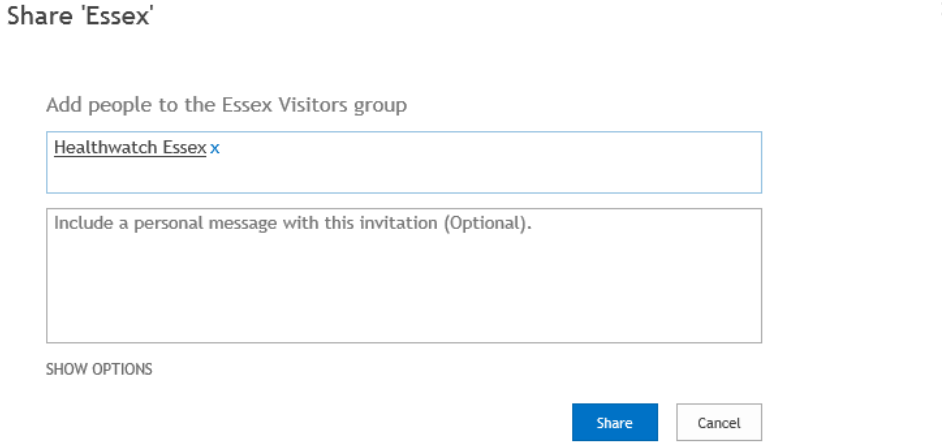
To see how to change content please use the same methods shown in the home page section

1.2.10.   Manage Security

Give users read and write access to the Local Healthwatch
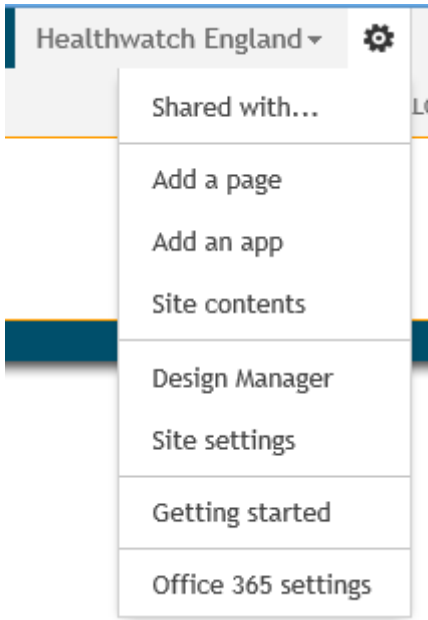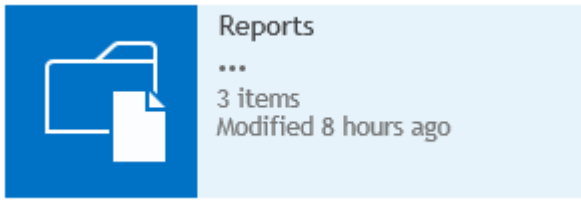
If you want other Local Healthwatch users or externally invited partners to update content for your Local Healthwatch site, you can add them to a 'Members' group for your Local Healthwatch. Once a member of this group they can add, edit and delete content. They can't however managed the site and security.
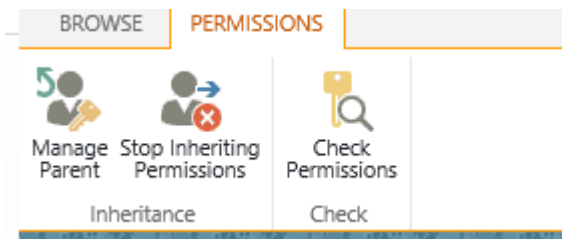
Step	Description	Screenshot
1.	To allow users to have read and write access click on edit icon in top right hand side of page	
2.	Click on "site settings"	
3.	Under "User and Permissions" click "Site permissions"	
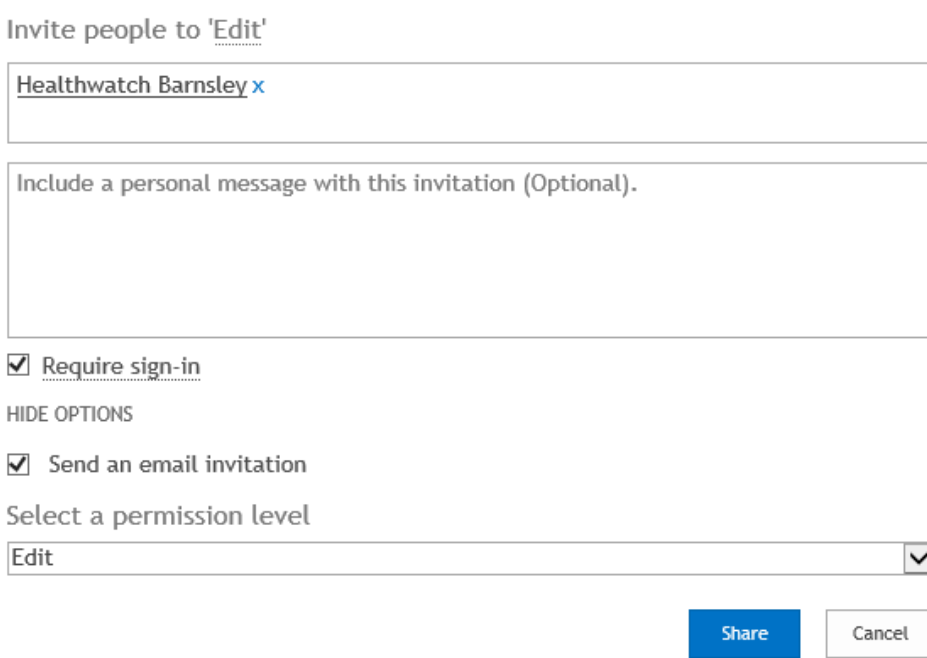
Step	Description	Screenshot
4.	Click the "Members group" prefixed with your Local Healthwatch name	**Essex Members**
5.	Click on "New" and then "Add Users"	New ▾ Actions ▾ Setting Add Users Add users to this group. ☐ Everyone except exte
6.	Type in the name of the person and any message you wish them to receive. Click Share to confirm.	Share 'Essex' ✕ Add people to the Essex Visitors group Healthwatch Essex x Include a personal message with this invitation (Optional). SHOW OPTIONS Share Cancel

Giving read and write access for users to a document library

If wishing to allow other Local Healthwatch or external users the ability to edit documents within a library on your Local Heathwatch site you can do so by following these instructions.

Step	Description	Screenshot
1.	Click on edit icon and click on "site content"	Healthwatch England ▾ ⚙ Shared with… Add a page Add an app Site contents Design Manager Site settings Getting started Office 365 settings
2.	Click on the document library you wish to change permissions for.	Reports … 3 items Modified 8 hours ago

Step	Description	Screenshot
3.	Click on library in the top ribbon and click on "Library settings"	LIBRARY Library Settings
4.	Click on the library permissions by clicking "Permissions for the document library"	▫ Permissions for this document library
5.	Click 'Stop inheriting permissions' on the ribbon bar	BROWSE PERMISSIONS Manage Parent Stop Inheriting Permissions Check Permissions Inheritance Check
6.	Click OK	? You are about to create unique permissions for this document. Changes made to the parent folder or document library permissions will no longer affect this document. OK Cancel

Step	Description	Screenshot
7.	Click 'Grant Permissions' on the ribbon	
8.	Enter the name of the Local Healthwatch or external user you wish to give permissions to. Click 'Show Options' and ensure user has 'Edit' permissions. Click 'Share' to complete	

Step	Description	Screenshot
9.	The user will now be granted 'edit' permission for the document library	⚠ This document has unique permissions. ☐ ☐ Name — Type — Permission Levels ☐ ☐ Approvers — SharePoint Group — Approve ☐ ☐ barnsley@hwhub.onmicrosoft.com — User — Edit

Managing read and write permissions on a document item
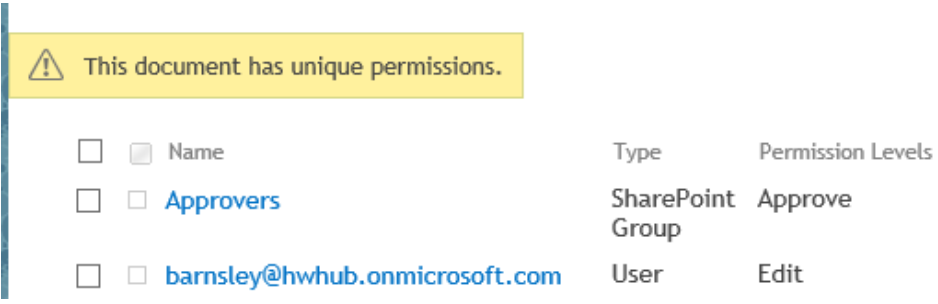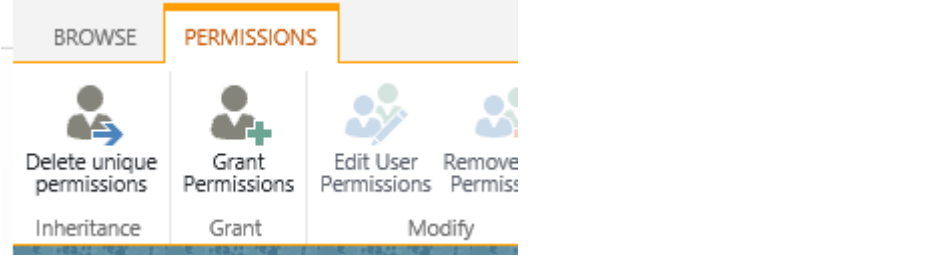
If wishing to allow read-write access to specific documents and for one or more users (external or Local Healthwatch) you can do so by following these instructions.

Step	Description	Screenshot
1.	To allow users to have read and write access click on edit icon and click on "site content"	Healthwatch England ▾ ⚙ Shared with… Add a page Add an app Site contents Design Manager Site settings Getting started Office 365 settings

Step	Description	Screenshot
2.	Click on the document library you wish to change permissions for.	Reports ••• 3 items Modified 8 hours ago
3.	Select the item that wish to edit permissions for. By clicking on the check box next to it.	✓ ExamplePage ✳ ••• 8 hours ago Healthwatch England Sample
4.	Click on the "files" option in the top ribbon and then click on "shared with". Finally click on "advanced"	FILES Shared With

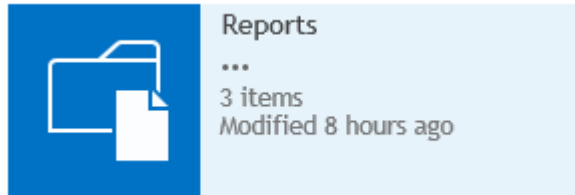| Step	Description	Screenshot
		Shared With ✕ Healthwatch Admin Healthwatch England Healthwatch Essex Everyone except external users INVITE PEOPLE EMAIL EVERYONE ADVANCED Close
5.	Click 'Stop inheriting permissions' on the ribbon bar	BROWSE PERMISSIONS Manage Parent Stop Inheriting Permissions Check Permissions Inheritance Check
6.	Click OK	You are about to create unique permissions for this document. Changes made to the parent folder or document library permissions will no longer affect this document. OK Cancel

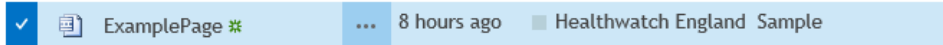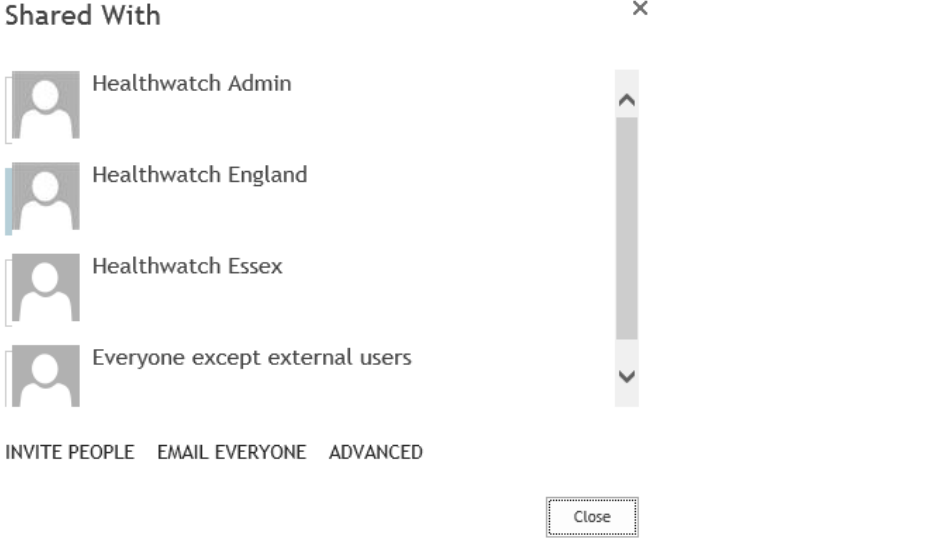| Step	Description	Screenshot
7.	Click 'Grant Permissions' on the ribbon	
8.	Enter the name of the Local Healthwatch or external user you wish to give permissions to. Click 'Show Options' and ensure user has 'Edit' permissions. Click 'Share' to complete	

Step	Description	Screenshot
9.	The user will now be granted 'edit' permission for the document	⚠ This document has unique permissions. Name — Type — Permission Levels Approvers — SharePoint Group — Approve barnsley@hwhub.onmicrosoft.com — User — Edit
10.	Click 'Delete unique permissions' to remove all custom granted permissions for the document	BROWSE PERMISSIONS Delete unique permissions / Grant Permissions / Edit User Permissions / Remove Permiss Inheritance — Grant — Modify

1.2.11.   Managing Local Healthwatch Site

Add new Document Library
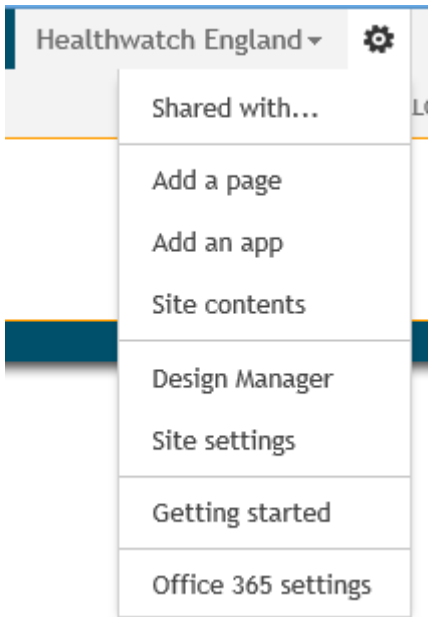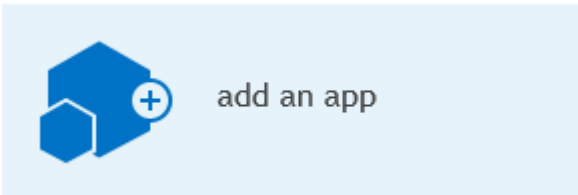
This section shows you how to create a new document library for storing documents and other content

Step	Description	Screenshot
1.	Click on edit icon and click on "site content"	

Step	Description	Screenshot
2.	Click on "Add new app"	
3.	Click "Document library"	
4.	Add name of new document library and click "Create". This could be for storing any types of document, similar to "Reports" or "Guidance Documents"	

Add New List

This section shows you how to create a new list for storing excel style tabular data within the Hub, enabling web based access for viewing and updating the data

5.	Click on edit icon and click on "site content"	Healthwatch England ▾ ⚙ Shared with… L(Add a page Add an app Site contents Design Manager Site settings Getting started Office 365 settings
6.	Click on "Add new app"	⬢⊕ add an app

| 7. | Click "Custom List" |

Custom List
Popular built-in app
App Details |
| 8. | Add name of new list and click "Create" | **Adding Custom List** ✕

Pick a name
You can add this app multiple times to your site. Give it a unique name.

Name:
sample

Advanced Options   Create   Cancel |
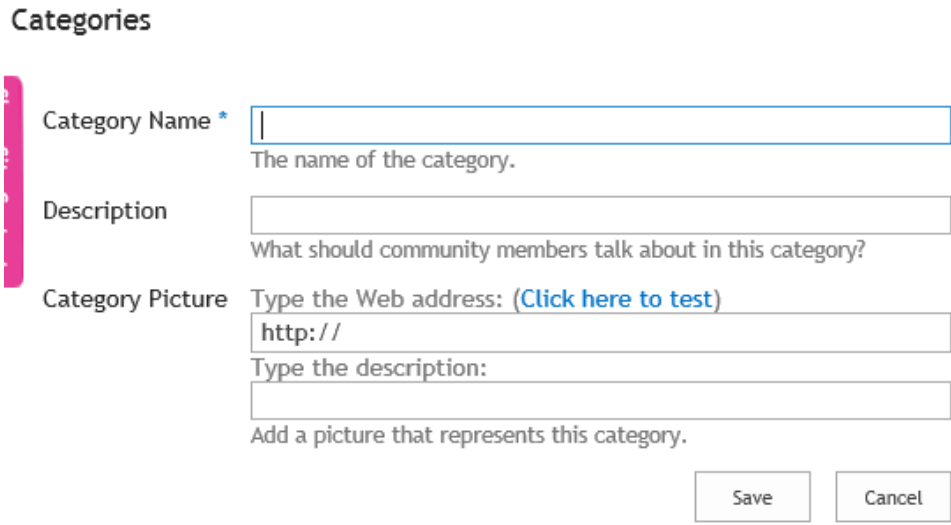
1.3. Community

1.3.1. Add a new discussion thread

Starting a discussion thread opens the question or topic up for other Local Healthwatch users to participate
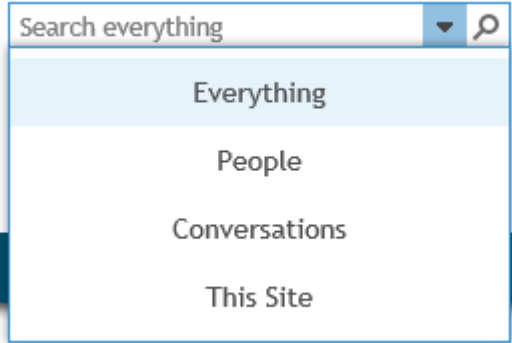
Step	Description	Screenshot
1.	Navigate to the community site via the top navigation menu	
2.	To add a discussion click on the "new discussion" link	⊕ new discussion
3.	Add the discussion information in the form and click "Save"	Subject * [ ] Body [ ] Question ☐ I am asking a question and want to get answers from other members. Category * General ▼ Save Cancel
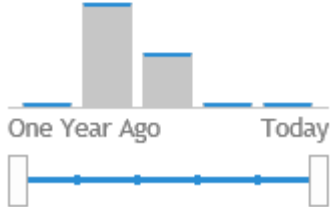
Step	Description	Screenshot
4.	To add a comment on a discussion click on the discussion link	Recent What's hot My discussions ••• **Is it beer oclock yet?** 1 reply 0 likes By **Healthwatch Lewisham** | In General | April 26 **I like pies, do you?** 5 replies 0 likes Meat and Potato By **Healthwatch Lewisham** | In General | Latest reply by **Healthwatch Lewisham** | April 26 **Share your tips here for getting the most out of the Hub** 0 replies 0 likes By **Healthwatch Admin** | In General | April 23 **What is the state of the care at home programme?** 0 replies 0 likes By **Healthwatch England** | In General | April 21
5.	Add comments and click reply	Add a reply Reply
6.	To create a discussion category click on "Create categories"	Create categories
7.	Then click "new item"	⊕ new item

Step	Description	Screenshot
8.	Add the category information and click save	**Categories** Category Name * [ ] The name of the category. Description [ ] What should community members talk about in this category? Category Picture — Type the Web address: (Click here to test) http:// [ ] Type the description: [ ] Add a picture that represents this category. [Save] [Cancel]

1.4. Search

Within this section you will be shown how to run searches and how to change the content you wish to search via the search scopes.

Step	Description	Screenshot
1.	Click in the search box at the top right and select from the drop down what scope you wish to search at.	Search everything Everything People Conversations This Site
2.	Type in your search words and click the search icon	Sample search

Step	Description	Screenshot
3.	On the right hand side of this page are filter you can use to refine your search results	**Result type** PDF Word **Author** Healthwatch Admin Care Quality Commission Diana ElsheikhA Healthwatch Essex SHOW MORE **Modified date** One Year Ago Today All
4.	To change the search type please select from one of the available links	**Everything** People Conversations

1.5. Navigate to Info Bank

The Info Bank is where reports and comments are stored and made available for search and extract to Local Healthwatch admins
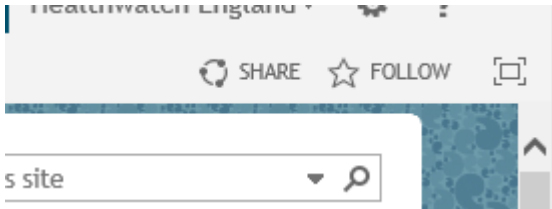
Step	Description	Screenshot
1.	Navigate to your allocated Local Healthwatch site	
2.	Click the 'Info Bank' link in the top navigation bar	Announcements Info Bank Resource
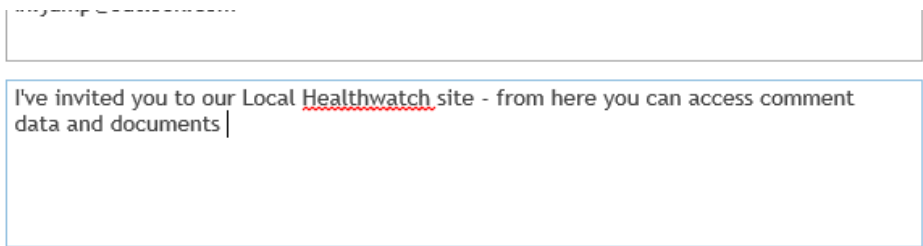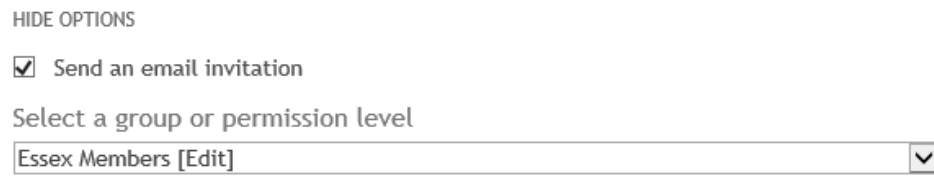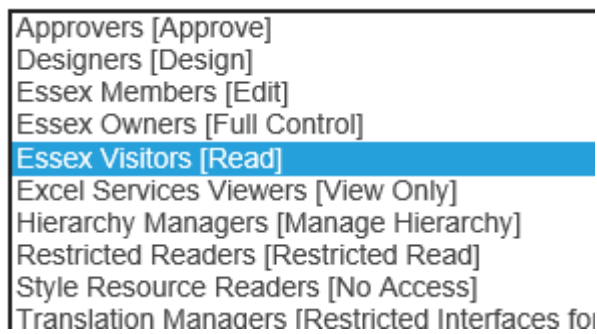
1.6. Invite External Users to Local Healthwatch
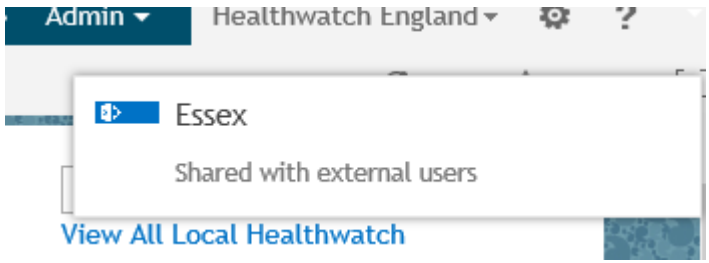
As a Local Healthwatch you can invite users external to your organisation, allowing them read-only access to Healthwatch England Hub, Your Local Healthwatch and Info Bank data.

1.6.1. Grant External User Access

The following steps invite an external user to the Hub

Step	Description	Screenshot
1.	Navigate to Local Healthwatch site and click 'Share' in top left of page	SHARE FOLLOW s site
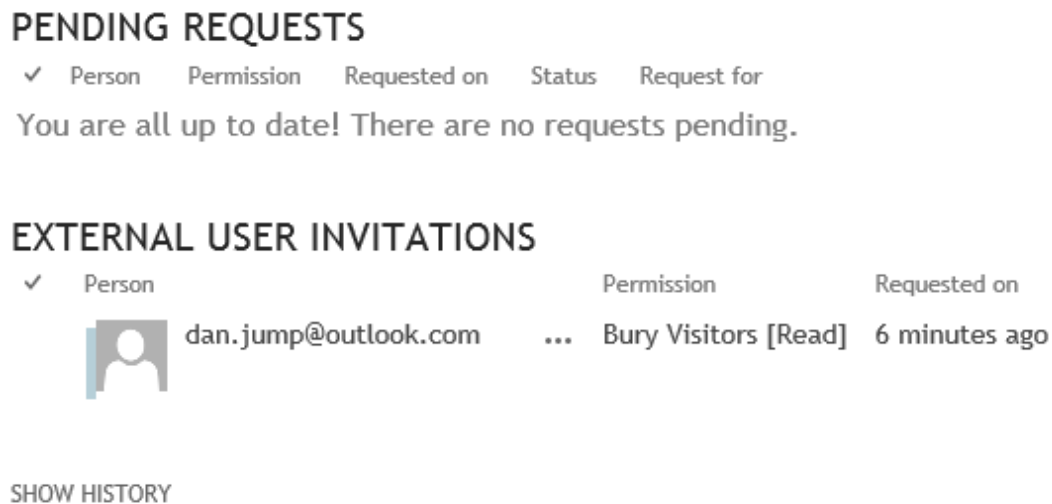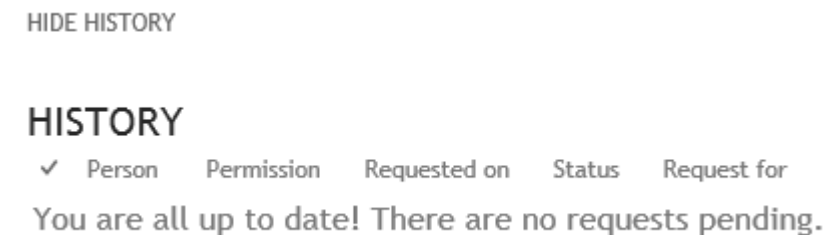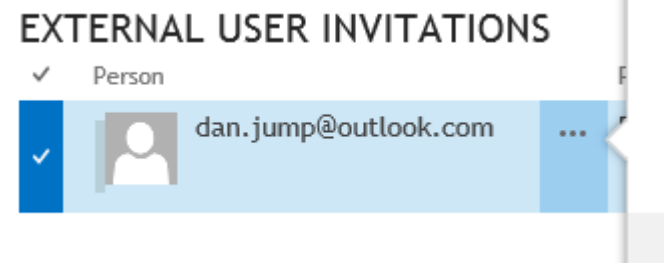
Step	Description	Screenshot
2.	Type the email address/addresses of the person you wish to give access to	Share 'Essex' 👥 Shared with **lots of people** Invite people to 'Edit' dan.jump@outlook.com
3.	Type a message to the recipient(s) (optional)	I've invited you to our Local Healthwatch site - from here you can access comment data and documents
4.	Click 'Show options' to reveal the security group to which the user will be invited	HIDE OPTIONS ☑ Send an email invitation Select a group or permission level Essex Members [Edit] ⌄
5.	Change the group to 'Visitors' prefixed with your local Healthwatch name	Approvers [Approve] Designers [Design] Essex Members [Edit] Essex Owners [Full Control] Essex Visitors [Read] Excel Services Viewers [View Only] Hierarchy Managers [Manage Hierarchy] Restricted Readers [Restricted Read] Style Resource Readers [No Access] Translation Managers [Restricted Interfaces fo
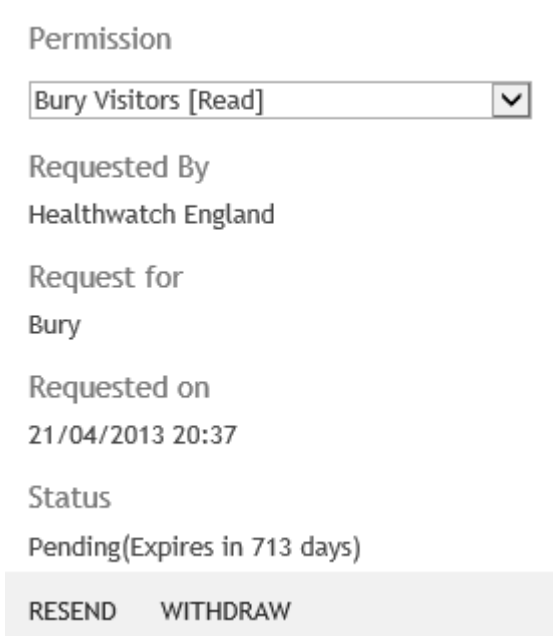
Step	Description	Screenshot
6.	Click 'Share' to send the invitation	
7.	Notification will show the invitation was successful	

1.6.2.   Review Current External User Invitations

The following lets you review any sharing invitations you've sent to external user's allowing access to your Local Healthwatch, Healthwatch England and the Info Bank.

Step	Description	Screenshot
1.	Navigate to Local Healthwatch	
2.	Click cog icon in top right of screen and select 'Site Settings'	
3.	Select 'Access requests and invitations'	

Step	Description	Screenshot
4.	The screen displays pending and requests for access received from users wishing to access your local Healthwatch but who do not have access (typically external users from other Local Healthwatch). Also shown are 'External User Invitations' that are sharing invitations you've sent to external users for your Local Healthwatch.	**PENDING REQUESTS** ✓ Person Permission Requested on Status Request for You are all up to date! There are no requests pending. **EXTERNAL USER INVITATIONS** ✓ Person Permission Requested on dan.jump@outlook.com ... Bury Visitors [Read] 6 minutes ago SHOW HISTORY
5.	Click 'Show history' to show prior sharing invitations.	HIDE HISTORY **HISTORY** ✓ Person Permission Requested on Status Request for You are all up to date! There are no requests pending.
6.	Click the edit button next to the invited user to amend their permissions and the invite	**EXTERNAL USER INVITATIONS** ✓ Person ✓ dan.jump@outlook.com ...
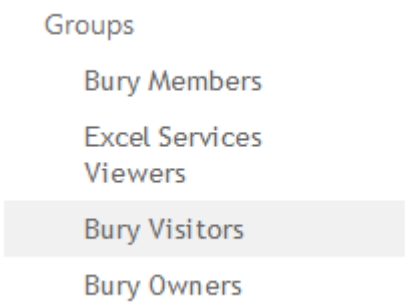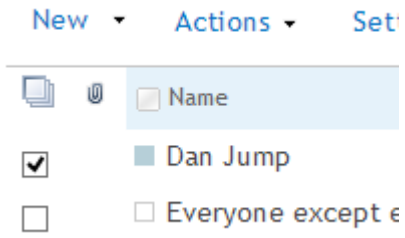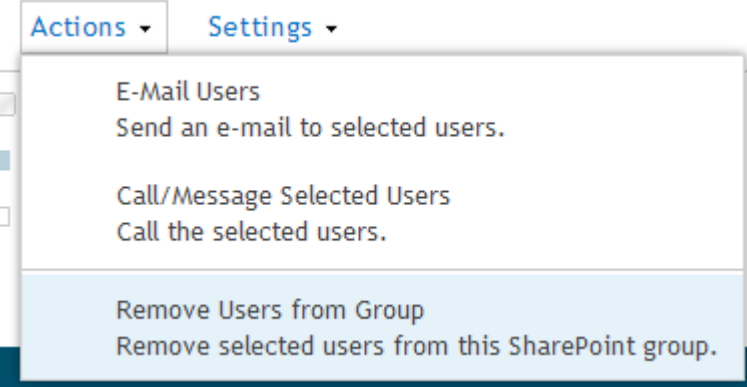
Step	Description	Screenshot
7.	Change the dropdown to amend the group the user has been invited to (Visitors = Read and is the recommend group for external users unless you wish them to be able to edit content) Click 'RESEND' to send a reminder invitation to the external user via email Click 'WITHDRAW' to cancel the invitation	Permission Bury Visitors [Read] Requested By Healthwatch England Request for Bury Requested on 21/04/2013 20:37 Status Pending(Expires in 713 days) RESEND WITHDRAW
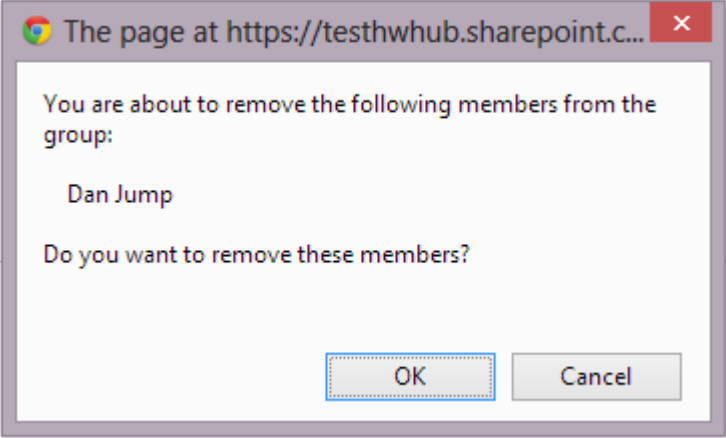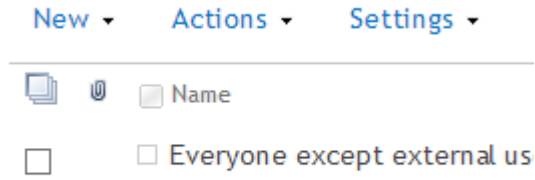
1.6.3. Remove External User From Security Group

To revoke access for an external user you must remove them from the group you invited them to.

Note: this does not revoke their access to Healthwatch England – you must contact a system admin or support to have them remove the user entirely

Step	Description	Screenshot
1.	Navigate to Local Healthwatch	
2.	Click cog icon in top right of screen and select 'Site Settings'	
3.	Select 'People and Groups'	
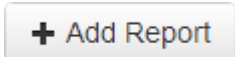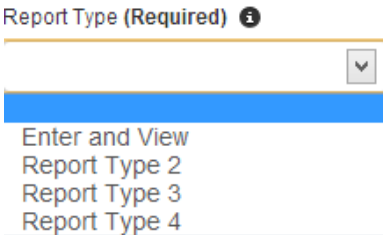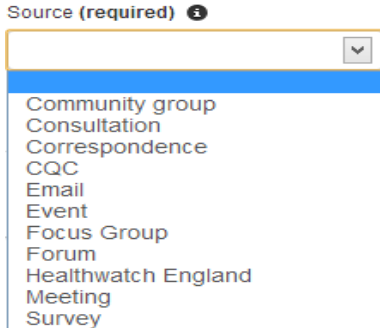
Step	Description	Screenshot
4.	Select 'Visitors' group (or whichever group you added the user to)	Groups Bury Members Excel Services Viewers Bury Visitors Bury Owners
5.	Check the user you wish to revoke permissions for	New ▾ Actions ▾ Set ☐ Name ☑ ■ Dan Jump ☐ ☐ Everyone except e
6.	Click the 'Actions' dropdown and select 'Remove User from Group'	Actions ▾ Settings ▾ E-Mail Users Send an e-mail to selected users. Call/Message Selected Users Call the selected users. Remove Users from Group Remove selected users from this SharePoint group.
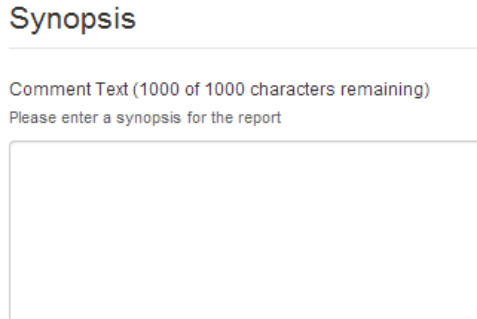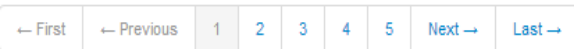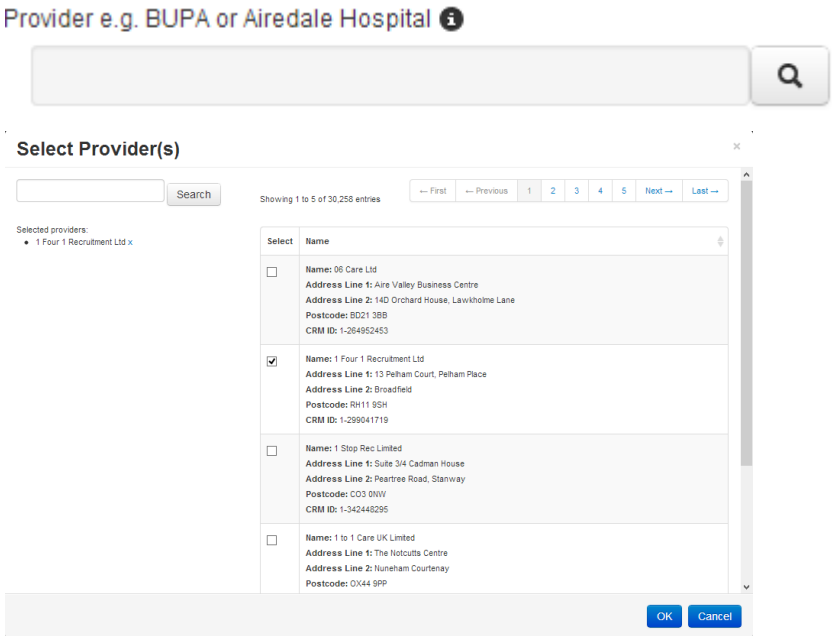
Step	Description	Screenshot
7.	Confirm warning message	The page at https://testhwhub.sharepoint.c... ✕ You are about to remove the following members from the group: Dan Jump Do you want to remove these members? OK Cancel
8.	User is removed from group	New ▾ Actions ▾ Settings ▾ ☐ Name ☐ ☐ Everyone except external us
9.	**IMPORTANT:** Once you've removed the user from a Local Healthwatch group this doesn't stop the user from being able to access Healthwatch England. If you wish to revoke access for the user contact support and ask for the external user to be removed. See 'Remove External User (PAL)' *in Healthwatch England User Guide*	
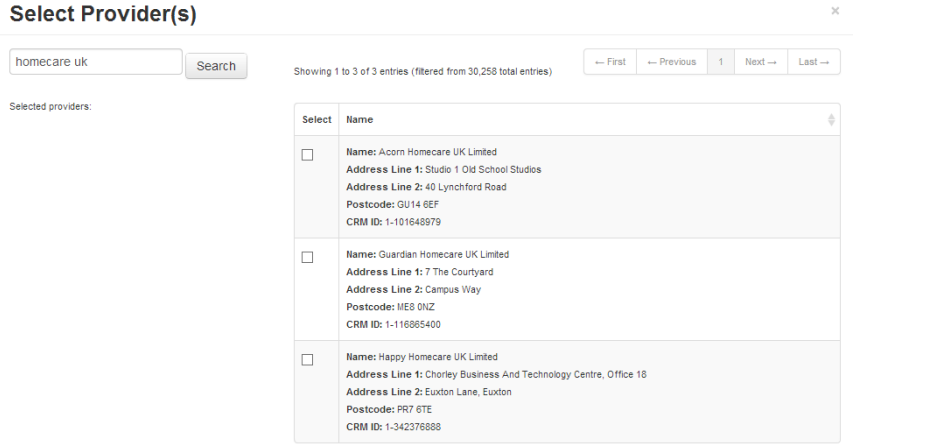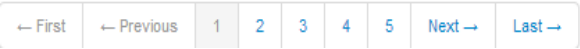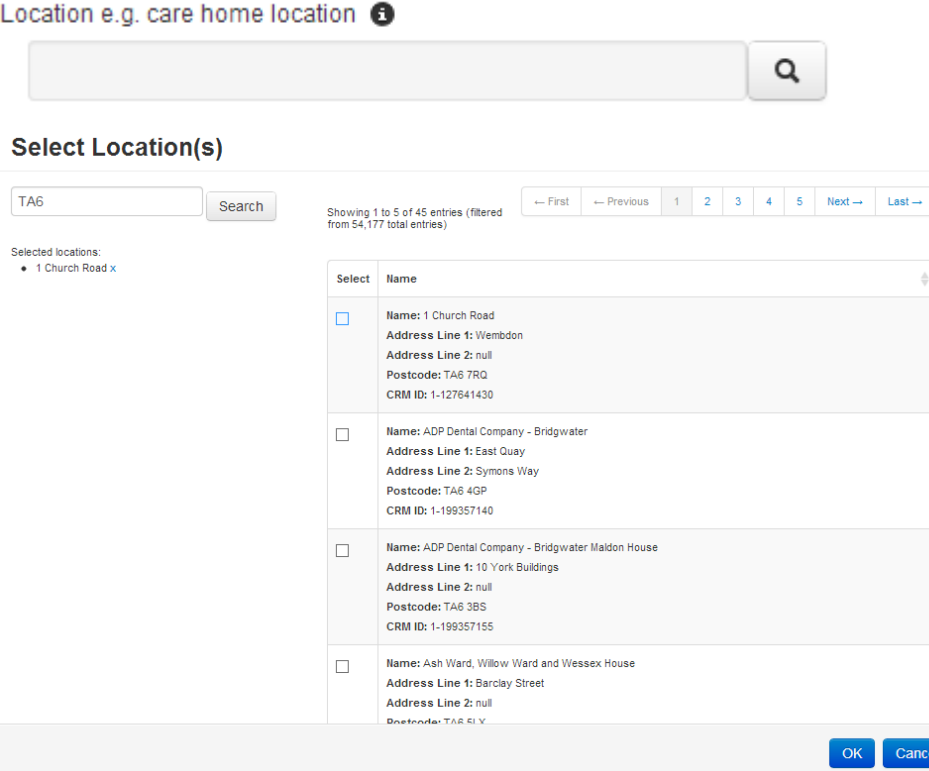
1.7. Manage Reports
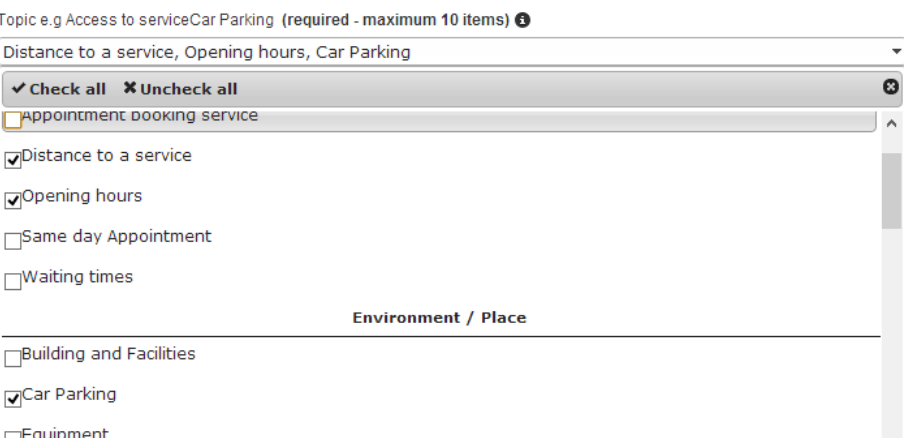
1.7.1.   Add Report
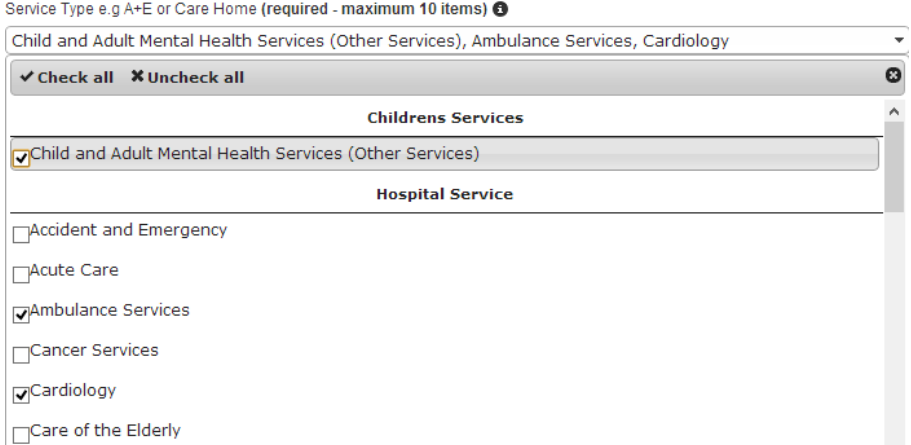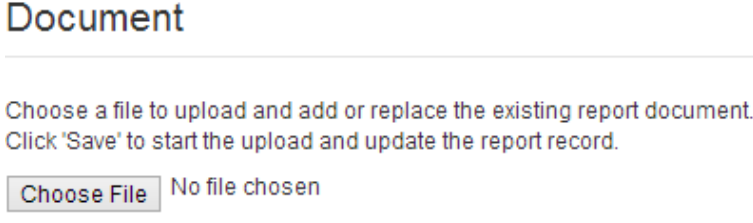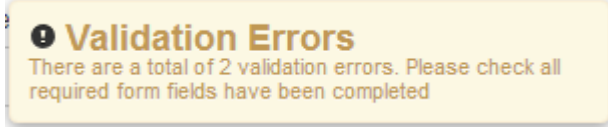
In order to create a new Report, you must fill in and save the 'Report' form

Step	Description	Screenshot
1.	Click 'Reports' on the InfoBank homepage to navigate to the reports area	Info Bank ← Essex Q Comments 🗊 Reports + Import Comments ✎ Settings
2.	Then Click 'Add Report' to navigate to Report Form	+ Add Report
3.	Provide the Report **Title** (mandatory)	Title(Required) ℹ
4.	Provide the **Report Type** (mandatory) Select a value from the options in the dropdown	Report Type (Required) ℹ Enter and View Report Type 2 Report Type 3 Report Type 4
5.	Provide the **Source** where the Report originated (mandatory) Select a value from the options in the dropdown	Source (required) ℹ Community group Consultation Correspondence CQC Email Event Focus Group Forum Healthwatch England Meeting Survey

Step	Description	Screenshot
6.	Provide the **Synopsis** for the Report (mandatory)	Synopsis Comment Text (1000 of 1000 characters remaining) Please enter a synopsis for the report
7.	Select a **Provider** to which the Report relates (optional) Click the [search icon] button next to the textbox to open the 'Select Provider(s)' page. - Either navigate to the desired Provider using [← First ← Previous 1 2 3 4 5 Next→ Last→] buttons - or 'Search' for a Provder by typing any text in the search box and hit the search button, it will bring back Providers whose name/address/postcode/crm id matches the search text Then, tick the checkbox next to the Provider you want (only one Provider can be selected) and click Ok.	Provider e.g. BUPA or Airedale Hospital ⓘ Select Provider(s) Showing 1 to 5 of 30,258 entries ← First ← Previous 1 2 3 4 5 Next→ Last→ Selected providers: • 1 Four 1 Recruitment Ltd x Select Name ☐ **Name:** 08 Care Ltd **Address Line 1:** Aire Valley Business Centre **Address Line 2:** 14D Orchard House, Lawkholme Lane **Postcode:** BD21 3BB **CRM ID:** 1-264952453 ☑ **Name:** 1 Four 1 Recruitment Ltd **Address Line 1:** 13 Pelham Court, Pelham Place **Address Line 2:** Broadfield **Postcode:** RH11 9SH **CRM ID:** 1-299041719 ☐ **Name:** 1 Stop Rec Limited **Address Line 1:** Suite 3/4 Cadman House **Address Line 2:** Peartree Road, Stanway **Postcode:** CO3 0NW **CRM ID:** 1-342448295 ☐ **Name:** 1 to 1 Care UK Limited **Address Line 1:** The Notcutts Centre **Address Line 2:** Nuneham Courtenay **Postcode:** OX44 9PP OK Cancel

Step	Description	Screenshot
		Select Provider(s) ⨯ homecare uk [Search] Showing 1 to 3 of 3 entries (filtered from 30,258 total entries) ←First ←Previous 1 Next→ Last→ Selected providers: **Select Name** ☐ **Name:** Acorn Homecare UK Limited **Address Line 1:** Studio 1 Old School Studios **Address Line 2:** 40 Lynchford Road **Postcode:** GU14 6EF **CRM ID:** 1-101648979 ☐ **Name:** Guardian Homecare UK Limited **Address Line 1:** 7 The Courtyard **Address Line 2:** Campus Way **Postcode:** ME8 0NZ **CRM ID:** 1-116865400 ☐ **Name:** Happy Homecare UK Limited **Address Line 1:** Chorley Business And Technology Centre, Office 18 **Address Line 2:** Euxton Lane, Euxton **Postcode:** PR7 6TE **CRM ID:** 1-342376888
8.	Select a **Location** to which the Report relates (optional) Click the [🔍] button next to the textbox to open the 'Select Location(s)' page. (If you have selected a Provdier above, then only those locations relating to the selected Provider will be shown) - Either navigate to the desired Location using ←First ←Previous 1 2 3 4 5 Next→ Last→ buttons - or 'Search' for a Location byt typing any text in the search box and hit the search button, it will bring back locations whose name/address/postcode/crm id matches the search text Then, tick the checkbox next to the Location you want (only one location can be selected) and click Ok.	Location e.g. care home location ⓘ [🔍] **Select Location(s)** ⨯ TA6 [Search] Showing 1 to 5 of 45 entries (filtered from 54,177 total entries) ←First ←Previous 1 2 3 4 5 Next→ Last→ Selected locations: • 1 Church Road x **Select Name** ☐ **Name:** 1 Church Road **Address Line 1:** Wembdon **Address Line 2:** null **Postcode:** TA6 7RQ **CRM ID:** 1-127641430 ☐ **Name:** ADP Dental Company - Bridgwater **Address Line 1:** East Quay **Address Line 2:** Symons Way **Postcode:** TA6 4GP **CRM ID:** 1-199357140 ☐ **Name:** ADP Dental Company - Bridgwater Maldon House **Address Line 1:** 10 York Buildings **Address Line 2:** null **Postcode:** TA6 3BS **CRM ID:** 1-199357155 ☐ **Name:** Ash Ward, Willow Ward and Wessex House **Address Line 1:** Barclay Street **Address Line 2:** null **Postcode:** TA6 5LX [OK] [Cancel]
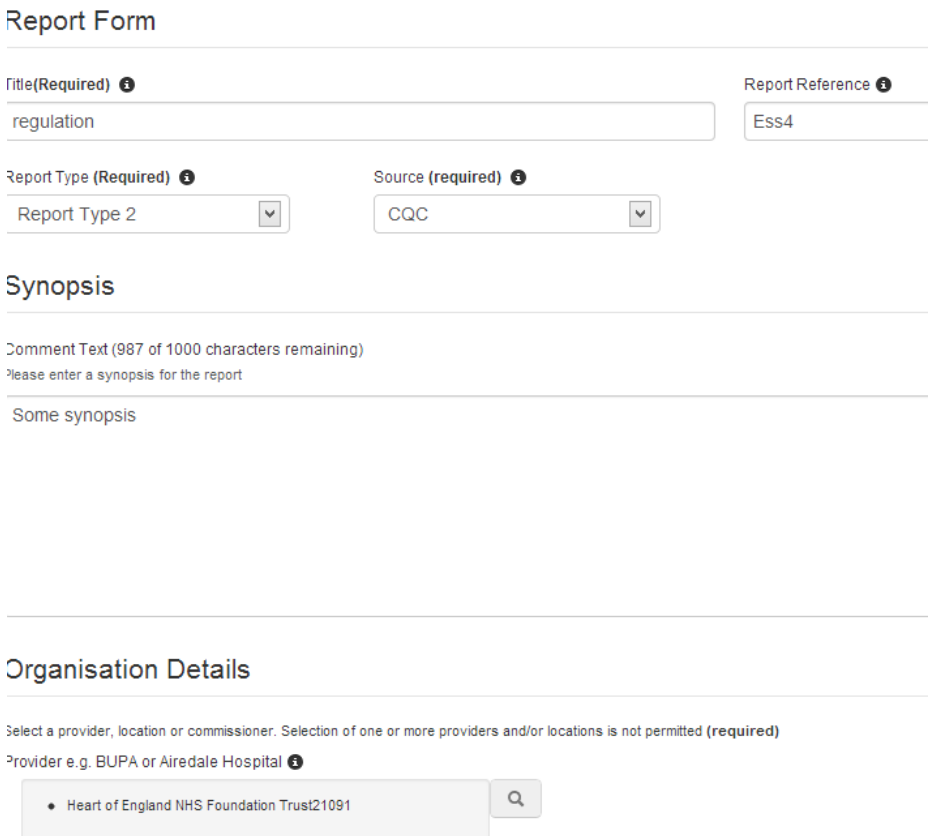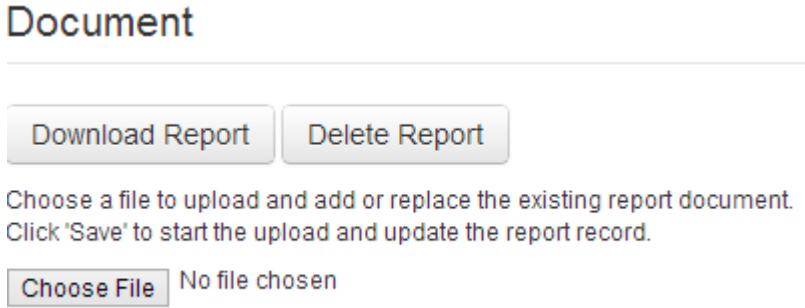
Step	Description	Screenshot
9.	Provide the **Commissioner** to which the Report relates (optional) Select a value from the options in the dropdown	Commissioner ⓘ Airedale, Wharfedale and Craven CCG Ashford CCG Aylesbury Vale CCG Barking & Dagenham CCG Barnet CCG Barnsley CCG Basildon and Brentwood CCG Bassetlaw CCG Bath and North East Somerset CCG
10.	Provide the **Report Topic** (mandatory) Select atleast 1 or maximum 10 items from the dropdown. To close the dropdown, click anywhere on the Report form.	Topic e.g Access to serviceCar Parking (required - maximum 10 items) ⓘ Distance to a service, Opening hours, Car Parking ✔ Check all ✘ Uncheck all ☐ Appointment booking service ☑ Distance to a service ☑ Opening hours ☐ Same day Appointment ☐ Waiting times **Environment / Place** ☐ Building and Facilities ☑ Car Parking ☐ Equipment

Step	Description	Screenshot
11.	Provide the **Service Type** (mandatory) Select atleast 1 or maximum 10 items from the dropdown. To close the dropdown, click anywhere on the Report form.	Service Type e.g A+E or Care Home (required - maximum 10 items) ⓘ Child and Adult Mental Health Services (Other Services), Ambulance Services, Cardiology ▾ ✔ Check all ✖ Uncheck all ✕ **Childrens Services** ☑ Child and Adult Mental Health Services (Other Services) **Hospital Service** ☐ Accident and Emergency ☐ Acute Care ☑ Ambulance Services ☐ Cancer Services ☑ Cardiology ☐ Care of the Elderly
12.	Upload report **Document** (optional) Click 'Choose File' to browse to the file, select the file and click 'Open'	# Document Choose a file to upload and add or replace the existing report document. Click 'Save' to start the upload and update the report record. [Choose File] No file chosen
13.	Click 'Save' to save the form data Or Click 'Cancel' to exit the form without saving	[Save] [Cancel]
14.	Before saving, the form will validate the data. - If there are no validation issues, the form data will be saved - If the validation fails, error message will be displayed and respective fields will be highlighted.	Example: ❶ **Validation Errors** There are a total of 2 validation errors. Please check all required form fields have been completed

Step	Description	Screenshot
		Report Type **(Required)** ⓘ Source **(required)** ⓘ This field is required. This field is required.
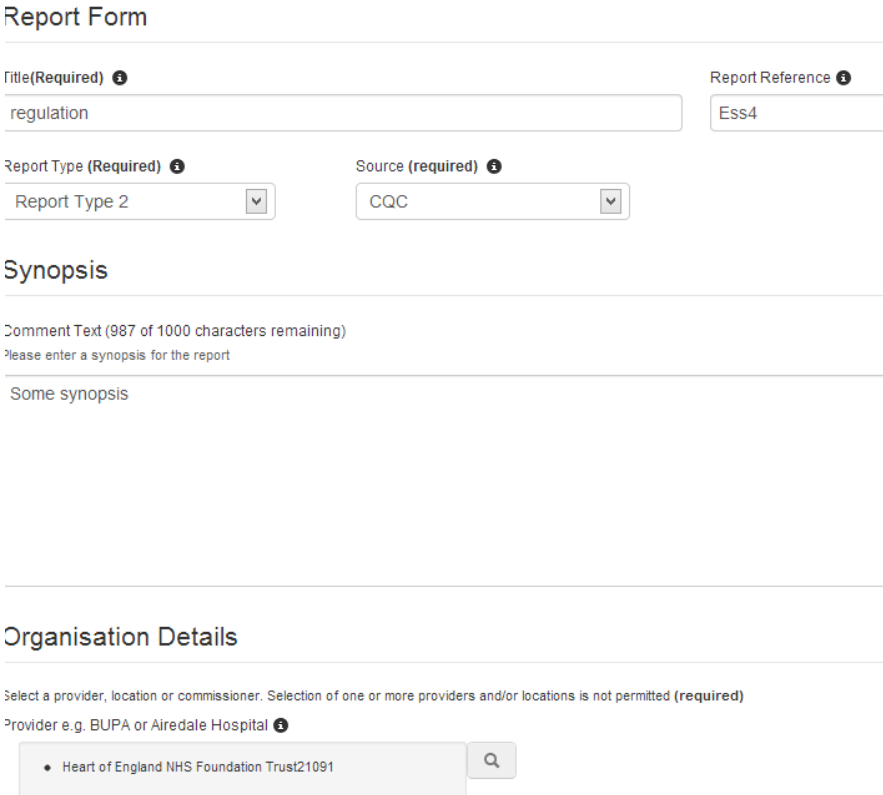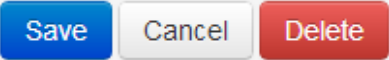
1.7.2.   Edit Report

Step	Description	Screenshot
1.	Click 'Reports' on the InfoBank homepage to navigate to the reports area	**Info Bank** ← Essex 🔍 Comments 📄 Reports ＋ Import Comments 🔧 Settings
2.	Select the Report Click on the ☑ button next to the Report you want to edit	← First ← Previous 1 Next → Last → 10 ▾ records per page |		Ref	Synopsis	Local Healthwatch	Provider	Location
☑	📄	Ess1	Test Synopsis	Essex	1 to 1 Care UK Limited		 owing 1 to 1 of 1 entries ← First ← Previous 1 Next → Last →
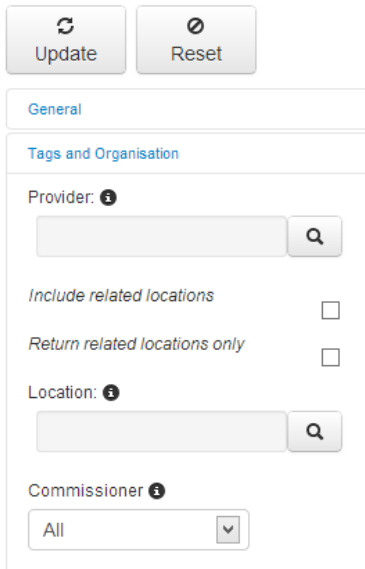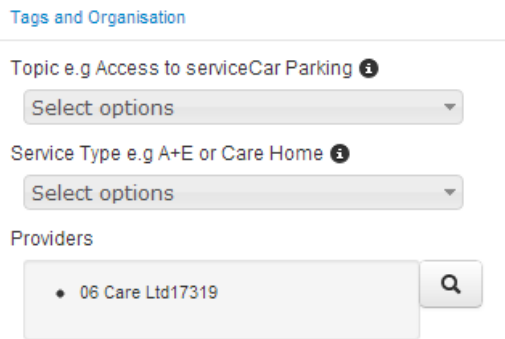
Step	Description	Screenshot
3.	Make the required changes The Report form will open pre-filled with Report data	**Report Form** Title(Required) ⓘ Report Reference ⓘ regulation Ess4 Report Type (Required) ⓘ Source (required) ⓘ Report Type 2 CQC **Synopsis** Comment Text (987 of 1000 characters remaining) Please enter a synopsis for the report Some synopsis **Organisation Details** Select a provider, location or commissioner. Selection of one or more providers and/or locations is not permitted **(required)** Provider e.g. BUPA or Airedale Hospital ⓘ • Heart of England NHS Foundation Trust21091
4.	You can also download, delete or replace the attached report document	**Document** Download Report Delete Report Choose a file to upload and add or replace the existing report document. Click 'Save' to start the upload and update the report record. Choose File No file chosen

Step	Description	Screenshot
5.	Click 'Save' to save the form data Or Click 'Cancel' to exit the form without saving	Save Cancel

1.7.3.   Delete Report

Step	Description	Screenshot
1.	Select the Report to delete Click on the ☑ button next to the Report you want to delete The Report form will open pre-filled with Report data	**Report Form** Title(Required) ❶ Report Reference ❶ regulation Ess4 Report Type (Required) ❶ Source (required) ❶ Report Type 2 ▾ CQC ▾ **Synopsis** Comment Text (987 of 1000 characters remaining) Please enter a synopsis for the report Some synopsis **Organisation Details** Select a provider, location or commissioner. Selection of one or more providers and/or locations is not permitted **(required)** Provider e.g. BUPA or Airedale Hospital ❶ • Heart of England NHS Foundation Trust21091 🔍
2.	Click 'Delete' button to delete the Report	Save Cancel Delete

1.7.4.   Search Reports

Step	Description	Screenshot
1.	Click 'Reports' on the InfoBank homepage to navigate to the reports area	
2.	Expand the required filters Click on any filter group like 'General' , 'Tags and Organisation' to view the various filters	
3.	Enter or select value(s) in the filter(s) For example- Source: Email, Provider: 06 Care Ltd17319	
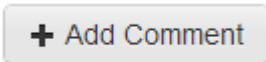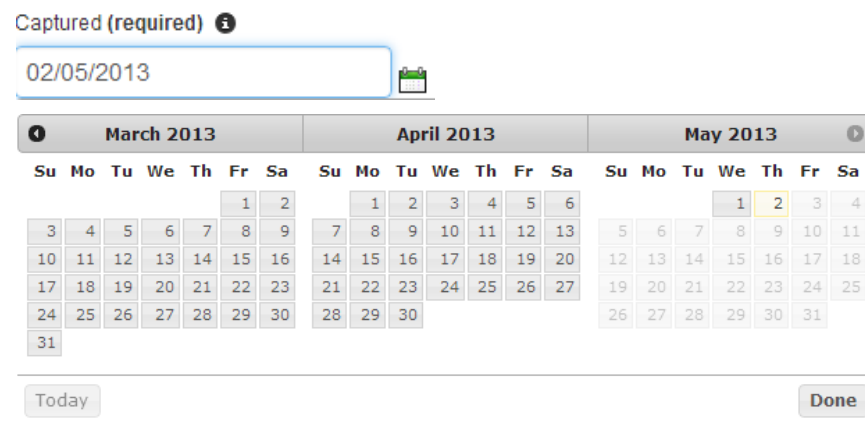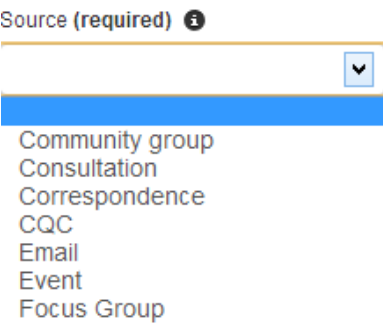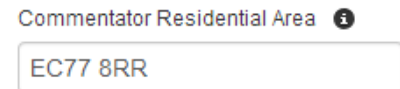
Step	Description	Screenshot
4.	Search Reports After you've selected the filters, hit the 'Update' button and the matching Reports will be displayed in the grid	⟳ Update
5.	Clear Search filters Hit the 'Reset' button to clear all search filters	⊘ Reset
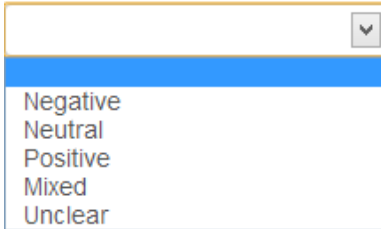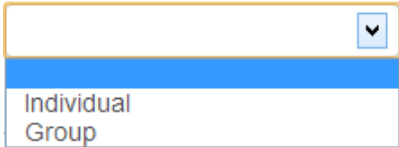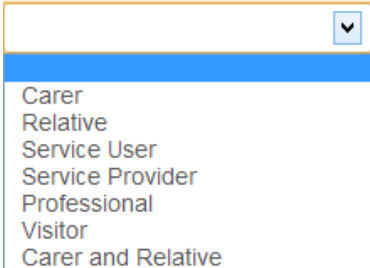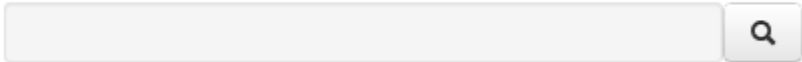
1.8. Manage Comments
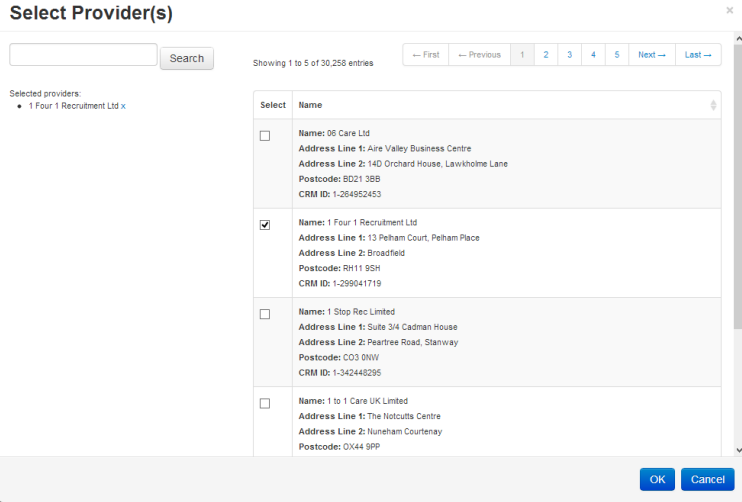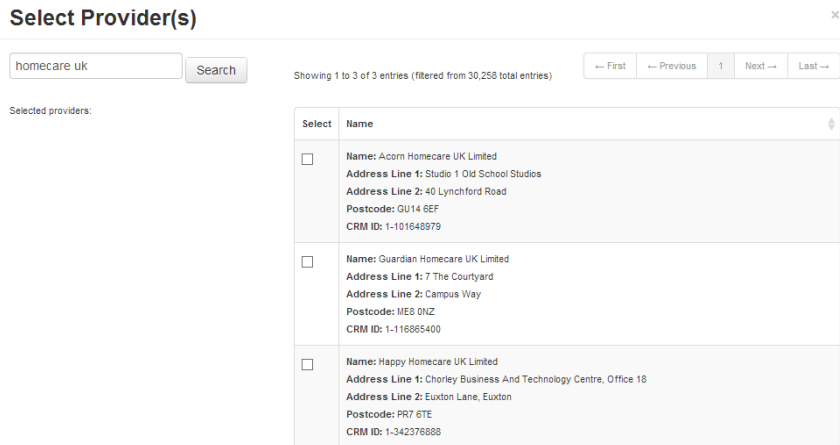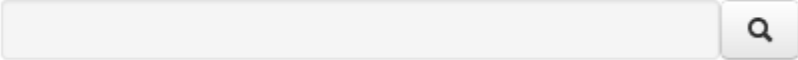
One of the purposes of the Info Bank is to store comment data. This can be achieved one comment at a time or by bulk import.
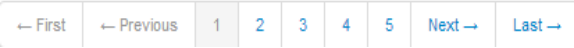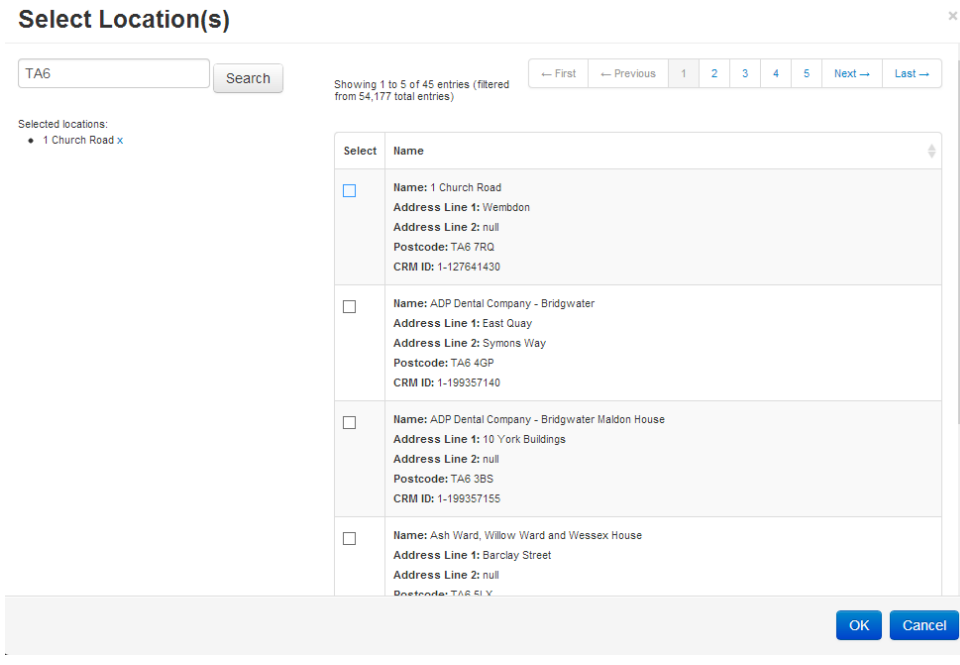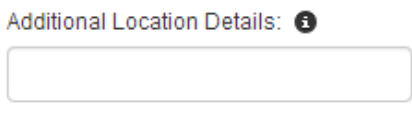
1.8.1.   Add Comment
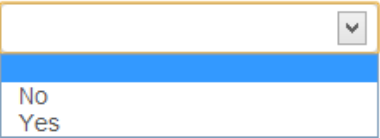
In order to enter a new comment, **a** user must **complete** and save the comment form
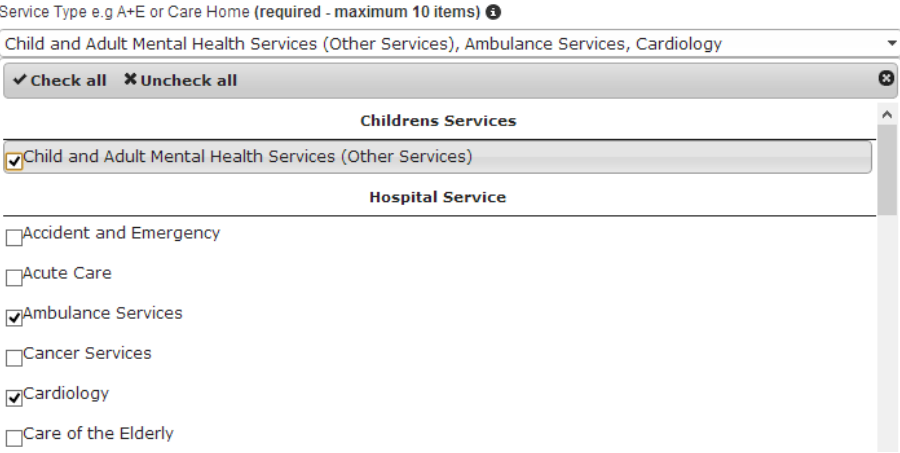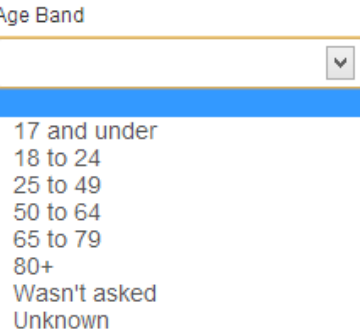
Step	Description	Screenshot
15.	Click 'Add Comment' on the InfoBank homepage to navigate to Comment Form	**+ Add Comment**
16.	Provide the comment **C**apture date (mandatory) To enter a date, select the calendar icon beside the text box and click on the desired date.	Captured (required) ⓘ 02/05/2013 March 2013 / April 2013 / May 2013 Today Done
17.	Provide the **Source** where the comment originated (mandatory) Select a value from the options in the dropdown	Source (required) ⓘ Community group Consultation Correspondence CQC Email Event Focus Group
18.	Enter the details about **Commentator Residential Area** (optional)	Commentator Residential Area ⓘ EC77 8RR
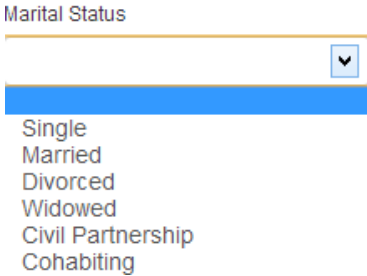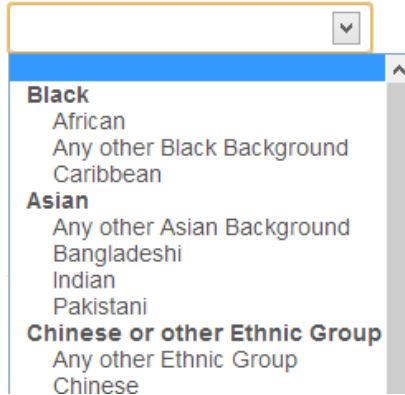
Step	Description	Screenshot
	Example: Postcode of the commentator	
19.	Provide the **Sentiment** behind the comment (mandatory) Select a value from the options in the dropdown	Sentiment (required) ⓘ Negative Neutral Positive Mixed Unclear
20.	Provide the **Commentator Audience** (mandatory) Select a value from the options in the dropdown	Commentator Audience (required) ⓘ Individual Group
21.	Provide the **Commentator Type** (mandatory) Select a value from the options in the dropdown	Commentator Type (required) ⓘ Carer Relative Service User Service Provider Professional Visitor Carer and Relative
22.	Enter **Additional Event Details** (if any) IF you are providing your own event details, please select 'Event' in the Source column	
23.	Select a **Provider** to which the comment relates (optional)	Provider e.g. BUPA or Airedale Hospital ⓘ 🔍
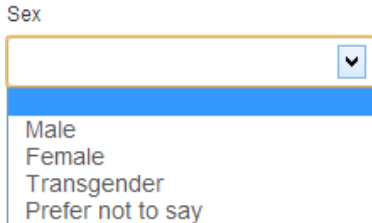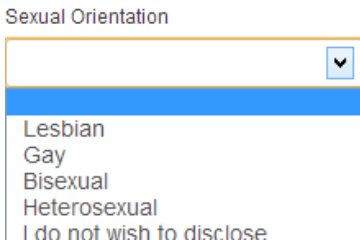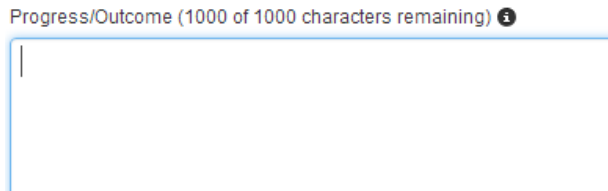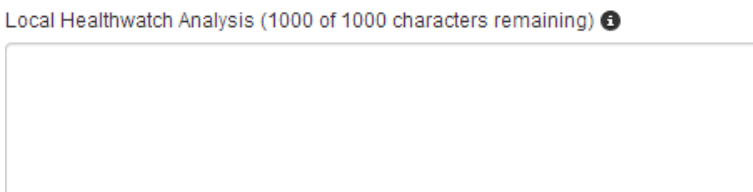
Step	Description	Screenshot
	Click the [🔍] button next to the textbox to open the 'Select Provider(s)' page. - Either navigate to the desired Provider using [← First] [← Previous] [1] [2] [3] [4] [5] [Next →] [Last →] buttons - or 'Search' for a Provder by typing any text in the search box and hit the search button, it will bring back Providers whose name/address/postcode/crm id matches the search text Then, tick the checkbox next to the Provider you want (only one Provider can be selected) and click Ok.	**Select Provider(s)** ✕ [ ] [Search] Showing 1 to 5 of 30,258 entries [← First] [← Previous] [1] [2] [3] [4] [5] [Next →] [Last →] Selected providers: • 1 Four 1 Recruitment Ltd x **Select** **Name** ☐ **Name:** 06 Care Ltd **Address Line 1:** Aire Valley Business Centre **Address Line 2:** 14D Orchard House, Lawkholme Lane **Postcode:** BD21 3BB **CRM ID:** 1-264952453 ☑ **Name:** 1 Four 1 Recruitment Ltd **Address Line 1:** 13 Pelham Court, Pelham Place **Address Line 2:** Broadfield **Postcode:** RH11 9SH **CRM ID:** 1-299041719 ☐ **Name:** 1 Stop Rec Limited **Address Line 1:** Suite 3/4 Cadman House **Address Line 2:** Peartree Road, Stanway **Postcode:** CO3 0NW **CRM ID:** 1-342448295 ☐ **Name:** 1 to 1 Care UK Limited **Address Line 1:** The Notcutts Centre **Address Line 2:** Nuneham Courtenay **Postcode:** OX44 9PP [OK] [Cancel] **Select Provider(s)** ✕ [homecare uk] [Search] Showing 1 to 3 of 3 entries (filtered from 30,258 total entries) [← First] [← Previous] [1] [Next →] [Last →] Selected providers: **Select** **Name** ☐ **Name:** Acorn Homecare UK Limited **Address Line 1:** Studio 1 Old School Studios **Address Line 2:** 40 Lynchford Road **Postcode:** GU14 6EF **CRM ID:** 1-101648979 ☐ **Name:** Guardian Homecare UK Limited **Address Line 1:** 7 The Courtyard **Address Line 2:** Campus Way **Postcode:** ME8 0NZ **CRM ID:** 1-116865400 ☐ **Name:** Happy Homecare UK Limited **Address Line 1:** Chorley Business And Technology Centre, Office 18 **Address Line 2:** Euxton Lane, Euxton **Postcode:** PR7 6TE **CRM ID:** 1-342376888
24.	Select a **Location** to which the comment relates (optional) Click the [🔍] button next to the textbox to open the 'Select Location(s)' page.	Location e.g. care home location ℹ [🔍]
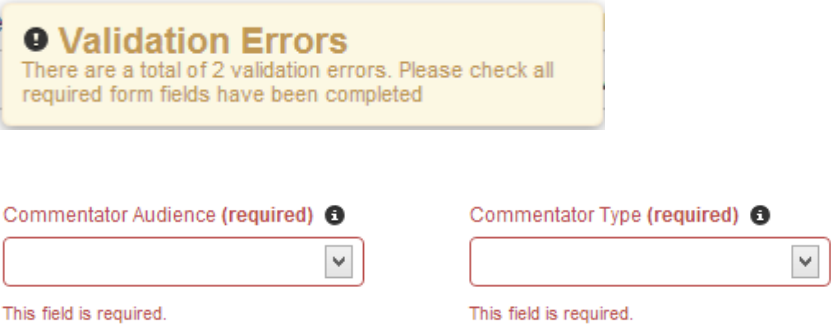
Step	Description	Screenshot
	(If you have selected a Provdier above, then only those locations relating to the selected Provider will be shown) - Either navigate to the desired Location using [← First] [← Previous] [1] [2] [3] [4] [5] [Next →] [Last →] buttons - or 'Search' for a Location byt typing any text in the search box and hit the search button, it will bring back locations whose name/address/postcode/crm id matches the search text Then, tick the checkbox next to the Location you want (only one location can be selected) and click Ok.	**Select Location(s)** TA6 [Search] Showing 1 to 5 of 45 entries (filtered from 54,177 total entries) ← First ← Previous 1 2 3 4 5 Next → Last → Selected locations: ● 1 Church Road x Select Name ☐ Name: 1 Church Road Address Line 1: Wembdon Address Line 2: null Postcode: TA6 7RQ CRM ID: 1-127641430 ☐ Name: ADP Dental Company - Bridgwater Address Line 1: East Quay Address Line 2: Symons Way Postcode: TA6 4GP CRM ID: 1-199357140 ☐ Name: ADP Dental Company - Bridgwater Maldon House Address Line 1: 10 York Buildings Address Line 2: null Postcode: TA6 3BS CRM ID: 1-199357155 ☐ Name: Ash Ward, Willow Ward and Wessex House Address Line 1: Barclay Street Address Line 2: null Postcode: TA6 5LX [OK] [Cancel]
25.	Enter **Additional Location Details** (optional)	Additional Location Details: ⓘ [ ]
12	Provide the **Commissioner** to which the comment relates (optional) Select a value from the options in the dropdown	Commissioner ⓘ [ ] [v] [ ] Airedale, Wharfedale and Craven CCG Ashford CCG Aylesbury Vale CCG Barking & Dagenham CCG Barnet CCG Barnsley CCG Basildon and Brentwood CCG Bassetlaw CCG Bath and North East Somerset CCG

Step	Description	Screenshot
13	Select whether the commentator would recommend the service (optional)	Would the individual supplying the comment recommend this service to friends or family? No Yes
14	Enter the **Comment** text (optional) Max 1000 characters	**Comment** Comment Text (987 of 1000 characters remaining) Please concisely, without providing any personally identifiable information, enter the comment you have received good comments
15	Provide the **Comment Topic** (mandatory) Select atleast 1 or maximum 10 items from the dropdown. To close the dropdown, click anywhere on the Comment form.	Topic e.g Access to serviceCar Parking (required - maximum 10 items) ⓘ Distance to a service, Opening hours, Car Parking ✔ Check all ✖ Uncheck all ⊗ ☐ Appointment booking service ☑ Distance to a service ☑ Opening hours ☐ Same day Appointment ☐ Waiting times **Environment / Place** ☐ Building and Facilities ☑ Car Parking ☐ Equipment
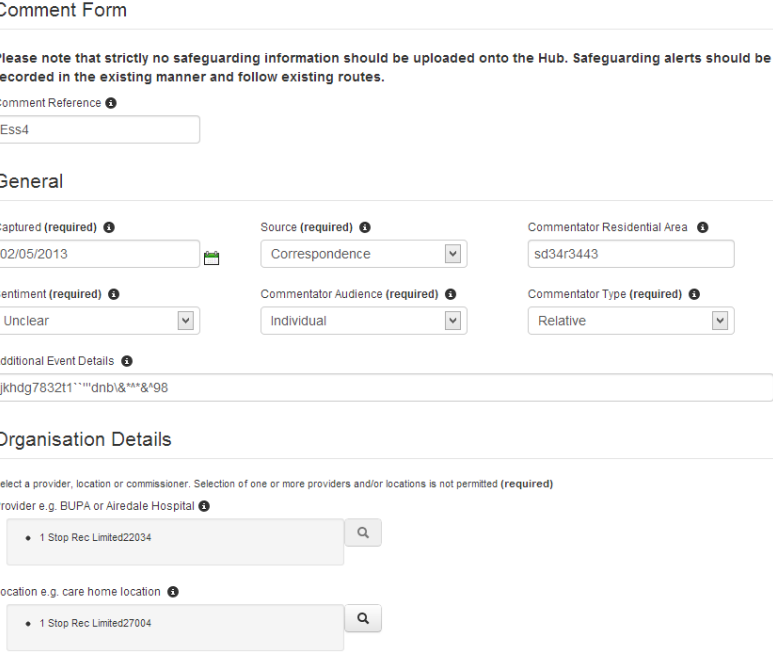
Step	Description	Screenshot
16	Provide the **Service Type** (mandatory) Select atleast 1 or maximum 10 items from the dropdown. To close the dropdown, click anywhere on the Comment form.	Service Type e.g A+E or Care Home (required - maximum 10 items) ⓘ Child and Adult Mental Health Services (Other Services), Ambulance Services, Cardiology ▾ ✔ Check all ✖ Uncheck all ⊗ **Childrens Services** ☑ Child and Adult Mental Health Services (Other Services) **Hospital Service** ☐ Accident and Emergency ☐ Acute Care ☑ Ambulance Services ☐ Cancer Services ☑ Cardiology ☐ Care of the Elderly
17	Provide the **Age Band** of the commentator (optional) Select a value from the options in the dropdown	Age Band ▼ 17 and under 18 to 24 25 to 49 50 to 64 65 to 79 80+ Wasn't asked Unknown
18	Enter the **Disability** of the commentator concisely (optional) Max 1000 characters	Disability: ⓘ

Step	Description	Screenshot
20	Provide the **Marital Status** of the commentator (optional) Select a value from the options in the dropdown	Marital Status Single Married Divorced Widowed Civil Partnership Cohabiting
21	Provide the **Ethnic Origin** of the commentator (optional) Select a value from the options in the dropdown	Ethnic Origin **Black** African Any other Black Background Caribbean **Asian** Any other Asian Background Bangladeshi Indian Pakistani **Chinese or other Ethnic Group** Any other Ethnic Group Chinese
22	Provide the **Religion Belief** of the commentator (optional) Select a value from the options in the dropdown	Religion/Belief Buddhist Jewish Christian Muslim Hindu Sikh

Step	Description	Screenshot
23	Provide the **Sex** of the commentator (optional) Select a value from the options in the dropdown	Sex Male Female Transgender Prefer not to say
24	Provide the **Sexual Orientation** of the commentator (optional) Select a value from the options in the dropdown	Sexual Orientation Lesbian Gay Bisexual Heterosexual I do not wish to disclose
25	Enter the **Progress/Outcome** if investigating issues relating to the comment (optional) Max 1000 characters	Progress/Outcome (1000 of 1000 characters remaining) ⓘ
26	Enter any **Local Healthwatch Analysis** carried out by the and to be stored against a comment (optional) Max 1000 characters	Local Healthwatch Analysis (1000 of 1000 characters remaining) ⓘ
27	Click 'Save and New' to save the form data and enter a new comment Or Click 'Save' to save the form data Or Click 'Cancel' to exit the form without saving	Save and New Save Cancel
28	Before saving, the form will validate the data.	Example:
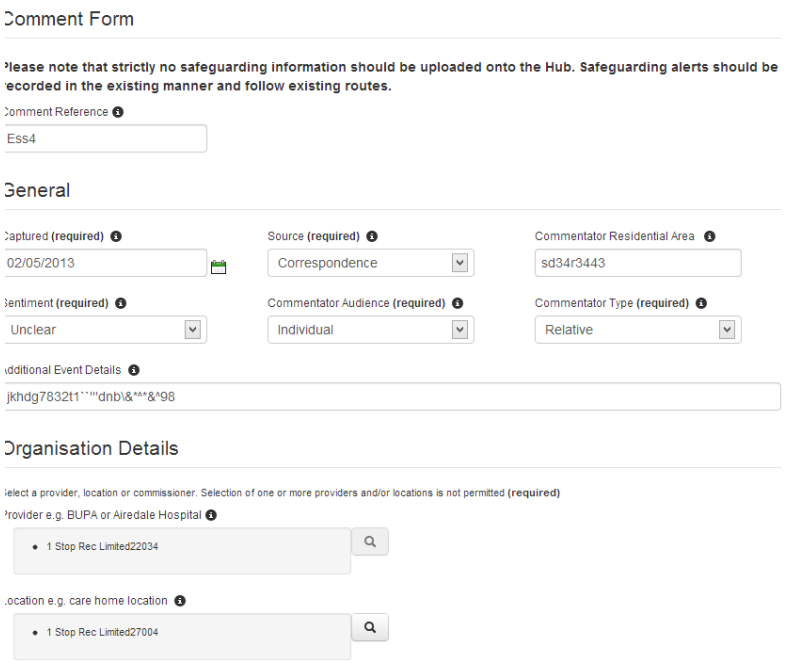
Step	Description	Screenshot
	- If there are no validation issues, the form data will be saved - If the validation fails, error message will be displayed and respective fields will be highlighted	**⚠ Validation Errors** There are a total of 2 validation errors. Please check all required form fields have been completed Commentator Audience **(required)** ⓘ Commentator Type **(required)** ⓘ This field is required. This field is required.
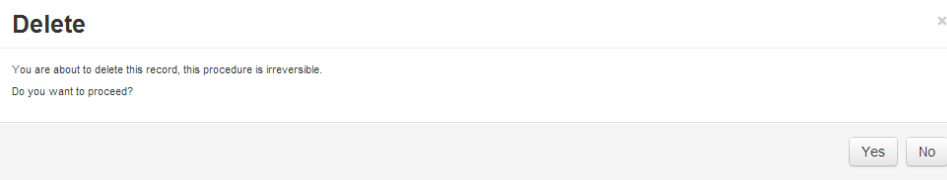
1.8.2.   Edit Comment

Step	Description	Screenshot
6.	Select the comment Click on the ✎ button next to the comment you want to edit - The comment form will open pre-filled with comment data - Make the required changes	**Comment Form** Please note that strictly no safeguarding information should be uploaded onto the Hub. Safeguarding alerts should be recorded in the existing manner and follow existing routes. Comment Reference ⓘ Ess4 **General** Captured (required) ⓘ Source (required) ⓘ Commentator Residential Area ⓘ 02/05/2013 Correspondence sd34r3443 Sentiment (required) ⓘ Commentator Audience (required) ⓘ Commentator Type (required) ⓘ Unclear Individual Relative Additional Event Details ⓘ jkhdg7832t1```"dnb\&*'*&^98 **Organisation Details** Select a provider, location or commissioner. Selection of one or more providers and/or locations is not permitted (required) Provider e.g. BUPA or Airedale Hospital ⓘ • 1 Stop Rec Limited22034 🔍 Location e.g. care home location ⓘ • 1 Stop Rec Limited27004 🔍

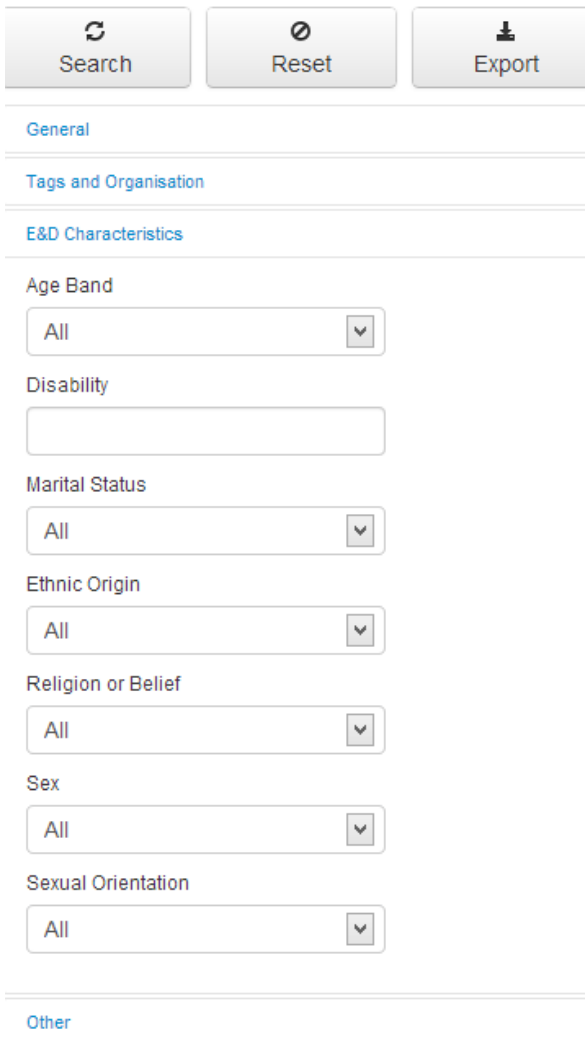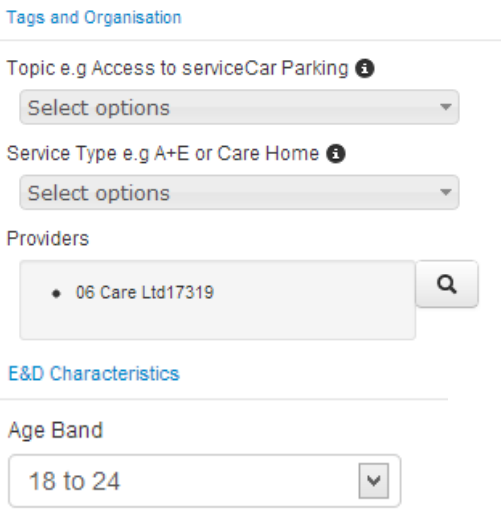| Step	Description	Screenshot
7.	Click 'Save and New' to save the form data and enter a new comment Or Click 'Save' to save the form data Or Click 'Cancel' to exit the form without saving	Save and New Save Cancel

1.8.3.   Delete Comment

Step	Description	Screenshot
3.	Select the comment to delete Click on the ☑ button next to the comment you want to delete The comment form will open pre-filled with comment data	Comment Form Please note that strictly no safeguarding information should be uploaded onto the Hub. Safeguarding alerts should be recorded in the existing manner and follow existing routes. Comment Reference ⓘ Ess4 General Captured (required) ⓘ Source (required) ⓘ Commentator Residential Area ⓘ 02/05/2013 Correspondence sd34r3443 Sentiment (required) ⓘ Commentator Audience (required) ⓘ Commentator Type (required) ⓘ Unclear Individual Relative Additional Event Details ⓘ jkhdg7832t1`` '"dnb\&^*^&^98 Organisation Details Select a provider, location or commissioner. Selection of one or more providers and/or locations is not permitted (required) Provider e.g. BUPA or Airedale Hospital ⓘ • 1 Stop Rec Limited22034 🔍 Location e.g. care home location ⓘ • 1 Stop Rec Limited27004 🔍
4.	Click 'Delete' button to delete the comment	Save and New Save Cancel Delete

Step	Description	Screenshot
5.	Confirm Deletion Click 'Yes' on the confirmation to delete the comment Or 'No' to abort delete operation	**Delete** × You are about to delete this record, this procedure is irreversible. Do you want to proceed? Yes No

1.8.4.   Search Comments

Step	Description	Screenshot
1.	Navigate to the Info Bank homepage or hit the 'Comments' button in the top navigation bar	**Q Comments**
2.	Expand the required filters Click on any filter group like 'General' , 'E&D Characteristics' to view the various filters	Search Reset Export General Tags and Organisation E&D Characteristics Age Band All Disability Marital Status All Ethnic Origin All Religion or Belief All Sex All Sexual Orientation All Other

Step	Description	Screenshot
3.	Enter or select value(s) in the filter(s) For example- Age Band: 18 to 24, Provider: 06 Care Ltd17319	Tags and Organisation Topic e.g Access to serviceCar Parking ⓘ Select options ▾ Service Type e.g A+E or Care Home ⓘ Select options ▾ Providers • 06 Care Ltd17319 🔍 E&D Characteristics Age Band 18 to 24 ▾
4.	Run a Search: After you've selected the filters, hit the 'Search' button and the matching comments will be displayed in the grid	⟳ Search
5.	Clear Search filters: Hit the 'Reset' button to clear all search filters	⊘ Reset
6.	Export comments: The 'Export' button will export all comments from the grid into an excel spreadsheet. User will be prompted (depending on browser) to save or open the excel spreadsheet User should ideally 'Search' the comments first and then export Please note that if no Comments filter criteria is specified, the Export function will by default export all	⬇ Export Do you want to open or save CommentExport.xls (6.50 KB) from test.hwhub.co.uk? [Open] [Save ▾] [Cancel] ×

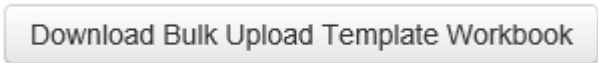| Step	Description	Screenshot
	comments from the database into the spreadsheet (this is limited to 10,000 records per export)	

1.9. Bulk Import Comments

The Info Bank supports bulk upload of comments via an Excel workbook. The steps in this process are:

a. Download template workbook containing extracts of all lookup data within the hub (providers, locations, topics etc.)

b. Perform lookups within the template workbook against an existing workbook of your own local comments and transform into the expected format and values

c. Upload workbook to the Info Bank and monitor batch for processing

d. Review any warnings or errors and either:

   i. View the batch and all associated comments

   ii. Delete the batch and all associated comments

1.9.1.   Upload Workbook and Schedule Import

User completes workbook template and uploads for processing of required comments

Step	Description	Screenshot
7.	Click '**Import Comments**' in navigation to navigate to the bulk upload page	**+ Import Comments**
8.	Click '**Download Bulk Upload Template Workbook**' to download a copy of the workbook template used for uploading a comment batch	Download Bulk Upload Template Workbook
9.	The downloaded workbook contains multiple sheets with lookup data required as part of a comment: • **DataImport** – sheet that should contain final transformed comment data to be imported into Info Bank	

Step	Description	Screenshot
	• **Lookups** – protected sheet used for validating data • **Other Sheets** – contain lookup data for use in transforming your own comment data into the format and values required for import into the Info Bank	Instructions **DataImport** Lookups CommentSubTopics CommentTopics ServiceTypes Commissioners Ser …
10.	**Bulk Comment Import Workbook Key Features**: 1. Doesn't replicate Comment Form and logic for data entry 2. Limited to 500 rows per workbook 3. Contains lookup values in multiple work sheets 4. 'Lookups' work sheet used for import and contains ID values for selected lookup fields 5. Maximum of 10 topics and service types can be selected for any comment record Mandatory fields marked in Red in 'DataImport' sheet	**Captured** **Source** **CommentatorResArea** **AgeBand** **Disability** **Ma** 04/04/2013 Website some comment 25 to 49 Sensory Div 04/04/2013 Correspondence some comment 26 to 49 Sensory Div 04/04/2013 Correspondence some comment 27 to 49 Sensory Div 04/04/2013 Correspondence some comment 28 to 49 Sensory Div
11.	**If you have an existing spreadsheet with comment data:** Transform existing comment data using lookup data in template and copy final set into the 'DataImport' sheet For example in the existing excel workbook you have comment data such as: *Source = "Email", Sentiment = "Not Known", Provider = "Argyle Care Group Limited", Location = "Willow Tree Lodge"* In this case, open the Template sheet downloaded from Info Bank and:- - Organize the columns in your existing sheet similar to	**Captured** **Source** Co **CommentatorResArea** **Sentiment** Co 2 03/04/2013 Email RH10 6SF Mixed 3 04/0 Email 4 Event Negative Focus Group Neutral 5 06/0 Forum Positive Healthwatch England Mixed 6 07/0 Meeting Unclear 7 Survey Telephone

Step	Description	Screenshot
	the column order in the template sheet - Ensure that column values in the existing sheet map to a lookup value in the template sheet For example in the scenario above, 'Email' is one of the options in the Source lookup – so that is fine but observe that 'Not Known' is not an option in the Sentiment lookup – so you must change the column text so that it maps to an option in the Sentiment lookup. - **Provider/Location**: The lookup for Provider/Location in the template sheet contains ProviderId/LocationId. To map the provider/location data from your existing sheet, open the 'Providers'/'Locations' workbook in the template sheet, search for Provider/Location based on Name/Address/Postcode etc., copy the ProviderId/LocationId to your existing sheet. - If you are unsure about a column value, you may leave it blank (provided it is not a mandatory field) When all the data has been validated, copy the data from existing sheet to 'DataImport' workbook in the Template spreadsheet. Save final file locally for upload to Info Bank	<table><tr><td></td><td>CRMProviderId</td><td>ProviderId</td><td>Name</td><td>AddressLine1</td></tr><tr><td>1</td><td colspan=4></td></tr><tr><td>2</td><td>1-101604150</td><td>121097</td><td>Sailsbury Management Services Limit</td><td>Salisbury House, 83-85 Egerton Park</td></tr><tr><td>3</td><td>1-101604168</td><td>121098</td><td>Mr & Mrs F Renshaw</td><td>Markham Road</td></tr><tr><td>4</td><td>1-101604186</td><td>121099</td><td>B Gelfand</td><td>11 St Vincents Road</td></tr><tr><td>5</td><td>1-101604195</td><td>121100</td><td>Lynden Hill Clinics Limited</td><td>Lynden Hill Clinic, Linden Hill Lane</td></tr><tr><td>6</td><td>1-101606204</td><td>121101</td><td>Argyle Care Group Limited</td><td>Redcourt Care Home</td></tr><tr><td>7</td><td>1-101606213</td><td>121102</td><td>The Laurels Nursing Home (Hastings)</td><td>71 Old London Road</td></tr><tr><td>8</td><td>1-101606222</td><td>121103</td><td>Amberwood Care Home Limited</td><td>218 Aylestone Lane</td></tr><tr><td>9</td><td>1-101606231</td><td>121104</td><td>Barons Park Nursing Home Limited</td><td>Barons Park Nursing Home Limited</td></tr><tr><td>10</td><td>1-101606240</td><td>121105</td><td>Brookdale Health Care Limited</td><td>14 Parkway</td></tr><tr><td>11</td><td>1-101606248</td><td>121106</td><td>Belford Care Limited</td><td>Belford Care Limited</td></tr><tr><td>12</td><td>1-101606257</td><td>121107</td><td>Chatting Independently Limited</td><td>3 Rectory Drive</td></tr><tr><td>13</td><td>1-101606266</td><td>121108</td><td>Star Residential Home Limited</td><td>5 New Broadway</td></tr></table> ◄ ► … | Locations **Providers** ServiceRecommen(… ⊕ ⋮ ◄
12.	**To create new comment data within the Template spreadsheet downloaded from Info Bank** - Open the Template sheet, go to the 'DataImport' workbook - Fill the column values. Select values where dropdowns are available otherwise type data.	<table><tr><td>**Field Name**</td><td>**Description**</td><td>**Mandatory**</td></tr><tr><td>Captured</td><td>Date the actual comment was registered (dd/mm/yyyy)</td><td>Y</td></tr><tr><td>Source</td><td>Source the comment originated from - lookup</td><td>Y</td></tr></table>

Step	Description	Screenshot		
	- **Provider/Location**: The lookup for Provider/Location in contains ProviderId/LocationId. To find out the Id of your desired Provider/Location, open the 'Providers'/'Locations' workbook within the template sheet, search for Provider/Location based on Name/Address/Postcode etc., note the ProviderId/LocationId, come back to the 'DataImport' workbook and selected the same Id in the Provider/Location dropdown. - If you are unsure about a column value, you may leave it blank (provided it is not a mandatory field) -		and select	
		CommentatorRes Area	Address details of the commentator, Postcode is preferred	N
		Sentiment	Sentiment behind the comment (like positive, negative etc.) - lookup and select	Y
		CommentatorAu dience	Type of audience - lookup and select	Y
		CommentatorTy pe	Type of Commentator - lookup and select	Y
		Event	Enter the titleof your own event. If using this box, select Event in the Source column	
		Provider	The Provider to which comment relates to - lookup and select or leave blank	
		Location	The Location to which comment relates to - lookup and select or leave blank	
		AdditionalLocatio nDetails	Additional location details	
		Commissioner	The commissioner for which a comment relates to - lookup and select or leave blank	
		ServiceRecomme ndation	Would you recommend this service to others or members of your own family? Value must be "Yes", "No" or blank	N
		Comments	Comments received from commentator	N
		CommentSubTop ic1		N
		CommentSubTop ic2		
		CommentSubTop ic3	The topics used to classify and organise an individual comment (minimum of 1 and maximum of 10 items allowed)	
		CommentSubTop ic4		
		CommentSubTop ic5		

Step	Description	Screenshot		
		CommentSubTopic6		
		CommentSubTopic7		
		CommentSubTopic8		
		CommentSubTopic9		
		CommentSubTopic10		
		ServiceSubType1	The service types used to classify and organise an individual comment (minimum of 1 and maximum of 10 items allowed)	N
		ServiceSubType2		
		ServiceSubType3		
		ServiceSubType4		
		ServiceSubType5		
		ServiceSubType6		
		ServiceSubType7		
		ServiceSubType8		
		ServiceSubType9		
		ServiceSubType10		
		AgeBand	Commentator age band	N
		Disability	Commentator disability	N
		MaritalStatus	Commentator marital status	N
		EthnicOrigin	Commentator ethnic origin	N
		ReligionBelief	Commentator religion or belief	N
		Sex	Commentator sex	N
		SexualOrientation	Commentator sexual orientation	N
		ProgressOutcome	For storing any progress made if investigating issues relating to the comment	N

Step	Description	Screenshot		
		LocalHealthwatchAnalysis	Any analysis carried out by the Local Healthwatch and to be stored against a comment	N
13.	In order to eliminate obvious anomalies in the data (which may lead to the batch being rejected), please ensure that in a particular row: - all mandatory cells are filled-in - there are no duplicate values for CommentSubTopics - there are no duplicate values for ServiceSubTypes			
14.	Click 'Upload New Batch' to navigate to the workbook upload page	Upload New Import Batch		
15.	Click or double click (browser dependent) 'Add bulk import file' to upload completed workbook	+ Add bulk import file		
16.	Browse to the completed workbook held locally			
17.	Click 'Start Upload' to upload bulk import workbook and schedule the batch for processing Click 'Cancel' to abort the upload and return to batch listing	⊙ Start upload Cancel		
18.	When the file is uploaded successfully, a new record is created and Batch import scheduled: • The File name is updated and made unique • Batch status marked as 'Received' • Created date equals current date/time of upload	**File Name** — **Batch Status** commentimport_template_201304220215025704.xls — Received commentimport_template_201304220151066227.xls — Received commentimport_template_201304220150515742.xls — Received		

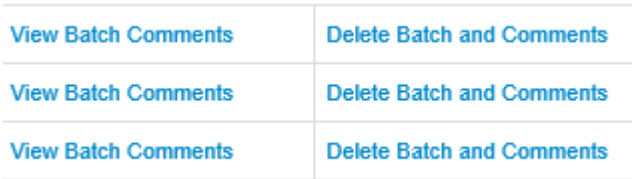| Step	Description	Screenshot
19.	The batch status will change to "Processing" when being imported	File Name / Batch Status / Created / Processing Start Time / Processing End Time — commentimport_template_afternoon_201304261553563572.xls / Processing / 26/04/2013 15:53:56 / 26/04/2013 16:07:04
20.	At the end of processing, the batch status will change to "Processing Completed" or "Processing Failed" based on the result. The "Error" column will be updated with either the error details in case of failure Or record count plus other information in case of successful import.	File Name / Batch Status / Created / Processing Start Time / Processing End Time / Errors / Warnings — commentimport_test1_500rows_20130429150335078.xls / Processing Completed / 29/04/2013 15:03:35 / 29/04/2013 15:05:53 / 29/04/2013 15:06:29 / >>> 482 rows inserted; commentimport_test1_500rows_201304291453180974.xls / Processing Completed / 29/04/2013 14:53:20 / 29/04/2013 14:55:43 / 29/04/2013 14:56:39 / >>> 482 rows inserted; commentimport_test2_5rows_201304291014237929.xls / Processing Failed / 29/04/2013 10:14:24 / 29/04/2013 10:24:00 / 29/04/2013 10:24:05 / Please see the logs for error details; commentimport_500rows_201304260958431910.xls / Processing Completed / 26/04/2013 09:58:43 / 26/04/2013 10:22:27 / 26/04/2013 10:23:12 / >>> 483 rows inserted

1.9.2.   **Automated Processing of Comment Import Workbook**

Scheduled job processes workbook, validates and accepts or rejects

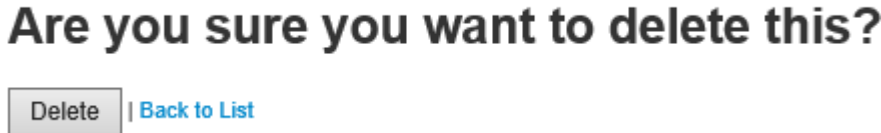| Step	Description	Screenshot
1.	System processes newly created batches with a status of 'Received' every 30 minutes	
2.	On start of processing the batch is marked as "Processing" and validation begins	
3.	The workbook status will change to one of the following after processing: • Processing Failed – due to invalid workbook lookup values, invalid file format or general system error • Processing Completed – all comment records imported	
4.	The error/warnings column will display any issues encountered when processing. Depending on the issue the user can choose to: • Delete the batch and all related comments • Modify comments manually for any warnings received • Amend and re-import workbook if workbook failed to import	Error Delete Batch and Comments Delete Batch and Comments Delete Batch and Comments

1.9.3.   View Batch and Comments

Each successful batch will remain linked to the comments it imported. Related comments can be viewed when making a decision to delete a batch.

Step	Description	Screenshot
1.	Click 'Import Comments' in navigation to navigate to the bulk upload page	**+ Import Comments**
2.	Click 'View Batch Comments' to see a listing of all comments imported as part of batch	View Batch Comments Delete Batch and Comments View Batch Comments Delete Batch and Comments View Batch Comments Delete Batch and Comments

1.9.4.   Delete Batch and Comments
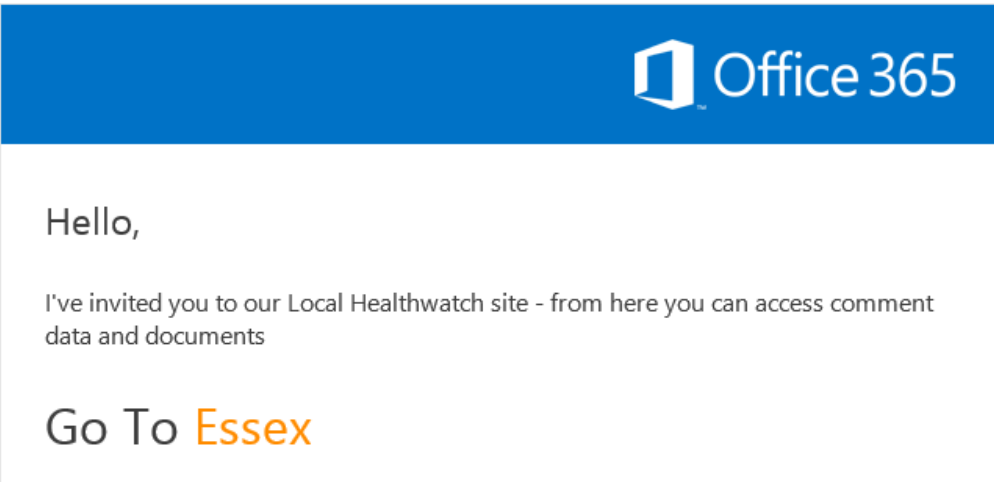
If a batch is created by accident, before or after processing the batch can be deleted

Step	Description	Screenshot
3.	Click 'Import Comments' in navigation to navigate to the bulk upload page	+ Import Comments
4.	Click 'Delete Batch and Comments' for the batch to be removed	<table><tr><th>File Name</th><th>Batch Status</th><th>Created</th><th>Processing Start Time</th><th>Processing End Time</th><th>Error</th><th></th></tr><tr><td>essex - comments batch jan_201304021143231651.xls</td><td>Received</td><td>02/04/2013 11:43:23</td><td></td><td></td><td></td><td>Delete Batch and Comments</td></tr><tr><td>essex - comments batch feb_201304021144062307.xls</td><td>Received</td><td>02/04/2013 11:44:06</td><td></td><td></td><td></td><td>Delete Batch and Comments</td></tr><tr><td>essex - comments batch mar_201304021144129682.xls</td><td>Received</td><td>02/04/2013 11:44:13</td><td></td><td></td><td></td><td>Delete Batch and Comments</td></tr></table>
5.	Confirm deletion or click 'Back to List' to return to the list of batches	Are you sure you want to delete this? Delete | Back to List
6.	On confirmation of deletion, if the batch has been processed all related comments will be deleted. Otherwise, the file will be removed before being processed.	

2. EXTERNAL PARTNER USER

2.1. Signing into a Local Healthwatch

External invited users must have a Microsoft Account or have associated their current email address with Windows Live ID. External users can do this at https://signup.live.com/ or the link is available when being first invited to a Local Healthwatch. Without this an external user cannot access the Hub or Info Bank.

Step	Description	Screenshot
1.	When an external user navigates to a Local Healthwatch (which they have been invited to via email), they will see a similar login screen to Local Healthwatch Admins. They must login using their Microsoft Account or Windows Live ID and password. If they don't have one of the above they can create one by associating their existing email address with Windows Live ID.	Office 365 Hello, I've invited you to our Local Healthwatch site - from here you can access comment data and documents Go To Essex

		Welcome to SharePoint Online To accept your invitation, sign in with a Microsoft account or an account assigned to you by your organization. **Microsoft account** Sign in with the account you use for SkyDrive, Xbox LIVE, Outlook.com, or other Microsoft services. **Organizational account** Sign in with the account provided by your work or school to use with Office 365 or other Microsoft services. Don't have either account? Create a Microsoft account, it's quick and easy!
2.	Once signed in they will be taken to the Local Healthwatch or Healthwatch England site entered into their address bar before signing in	

2.2. Accessing Other Local Healthwatch Sites and Content

If an External User hasn't been invited to a Local Healthwatch they will see an access request message. This occurs when navigating directly to the site or clicking the specific Local Healthwatch in the list displayed on the Healtwatch England site.

Step	Description	Screenshot
1.	Navigate to a Local Healthwatch that you don't have access to	
2.	Complete access reason request and click 'Send Request' Request will be sent to the Local Healthwatch Admin	Let us know why you need access to this site. Type your message here Send request